

# Get a leading edge on your investment portfolio

with CFS Edge, our newest and most dynamic wealth management platform



## Introducing CFS Edge

Backed by the investment power and expertise of Colonial First State (CFS), CFS Edge is a dynamic investment platform that lets you hold your investments in one convenient and easy to use digital platform.

CFS Edge provides access to an extensive range of investment options, comprehensive reporting, and sophisticated tax management facilities so you and your adviser can design a portfolio to suit your investment and retirement needs.

## How it works

Through CFS Edge, you can make a range of super and investment contributions to help you save for retirement and manage your pension once you retire.

Our one-stop online service makes investing easy and offers you professional savings, trust and self-managed super fund (SMSF) solutions. Your adviser can help you to build an investment portfolio aligned to your goals and needs, utilising our diverse range of investment products and flexible and easy-to-understand investment solutions.

## Benefits at a glance:

- See how your money is performing 24/7 via the client portal or on the mobile app
- Access to over 500 investment options, including managed funds, managed accounts, securities, ETFs, term deposits, international shares, foreign currency and cash
- Less hassle at tax time, with consolidated tax reporting
- Competitive fees and family discount opportunities
- Confidence that your data is secure, with industry-leading cyber security and multi-factor authentication

# The client portal and mobile app makes it easy to keep track of your investments and more

**View and update your personal details** - Callout pointing to the user profile icon in the top right navigation bar.

**Easy to find notifications** - Callout pointing to the notification bell icon in the top right navigation bar.

**Access reports and upload documents securely** - Callout pointing to the 'Administration' and 'Documents' menu items in the top navigation bar.

**Keep track of your holdings** - Callout pointing to the 'Investments' menu item in the top navigation bar.

**View your cash statement, deposit and withdrawal history** - Callout pointing to the 'Recent transactions' widget on the dashboard.

**Authorise activities on your account** - Callout pointing to the 'Administration' menu item in the top navigation bar.

**Click to chat** - Callout pointing to the chat icon in the bottom right corner of the dashboard.

**Customise your dashboard to suit you** - Callout pointing to the 'Manage widgets' button at the bottom of the dashboard.

**Dashboard Content:**

- Header:** Colonial First State logo, user name 'Good afternoon, Rachael', and total wealth 'AUD 2,259,387.04'.
- Navigation:** Dashboard, Accounts, Investments, Cash & payments, Orders, Product details, Administration, Documents.
- My account dashboard:**
  - Account valuation:** AUD 1,480,583.90
  - Asset allocation:** Australian Equities (43.11%), International Equities (19.46%), Australian Fixed Income (13.31%), Cash (12.99%), Alternatives & Other (5.63%), Infrastructure (3.51%).
  - Recent transactions:** Table with columns Date, Description, Amount (AUD). Includes transactions like 'Buying 1,650 Partners Group Global Value W @ AUD1.00'.
  - Adviser details:** Mary Elizabeth Johnson, +61 0900123123, maryjohnson@gmail.com.au
  - Geographic diversification:** World map showing asset distribution.

## Download our mobile app

Tap on either the Apple or Android button or scan the QR code to download the CFS Edge app.



## To find out more

For more information on CFS Edge, please contact your adviser or call us on 1300 769 619, Monday to Friday, 8:30am–6pm, Sydney time.

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