



# MOVING ADVISER VALUE FORWARD, TOGETHER

# THE ALPHA IS IN THE ADVICE

Pacific Asset Management (PAM) believes in the power of progress and innovation; we are helping to put control and value back in the hands of advisers. Everything we do is designed with the adviser and their clients in mind.

## About PAM

PAM is a fresh and progressive asset manager, rethinking the conventions of how asset management works for advisers, institutions, investors, asset owners and the industry.

We are responsible for over \$3.7 billion\* of assets for our clients. \*As at 31 Dec 2021.

As a privately owned business, unencumbered by legacy, we can rethink the conventions of asset management and move forward, making it better for all.

We continue to push the boundaries to provide better solutions for our partners and clients.

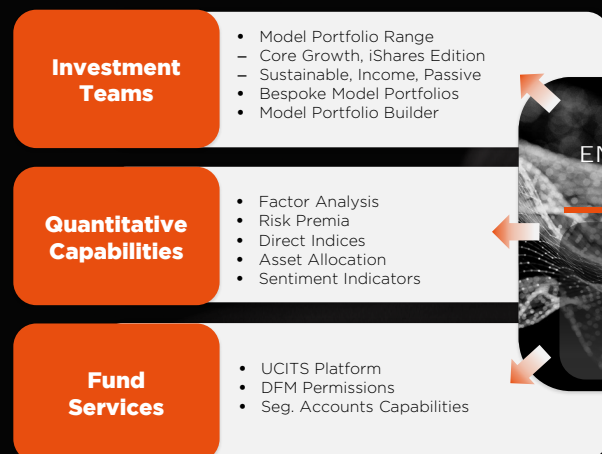
## Moving Adviser Value Forward, Together

Whether it's evolving a legacy advisory portfolio range following acquisition, considering the future value of an in-house DFM, through to working with an investment partner to mandate a range of co-created multi-asset portfolios or co-creating unitised funds designed to meet custom adviser requirements, providers must be able to look further and wider to adapt to the changing needs of advisers.

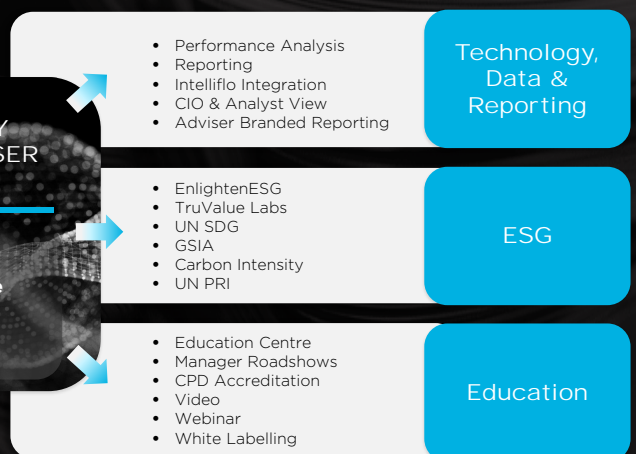
## Drawing from the breadth of PAM's core asset management expertise

As a core investment partner to your firm, we will offer guidance; looking across your business at all key touch points around your investment solutions. We look at the back-office system, key investment platforms, existing proposition, risk profilers, your paraplanning team, your annual review process and your data.

### INVESTMENT SERVICES



### CLIENT SERVICING & ENGAGEMENT



PAM ADVISER LAB: 24hrs a day / 7 days a week



# PAM ADVISER LAB

For each adviser we work with, we build a customised, adviser branded web portal, fully equipped with a suite of tools and tech enabled resources, adviser branded materials and bespoke client proposal packs.

## Link between the CIP and the Financial Adviser



For asset managers to stay relevant, it is vital we deliver not just product, but solutions, putting the power and value back in the hands of advisers. At Pacific we work closely with all our clients to deliver great client outcomes with exceptional levels of service, as a truly 'in-sourced' investment partner.

- Freddie Streeter, Head of Global Solutions

## Motivated by solving problems

Our investment solutions are robust and scalable and designed to deliver maximum value for your clients, as well as your business. Our solutions integrate across your platforms and map in with your chosen risk profiler. They can be delivered in multiple formats to best suit your objectives: spanning across Advisory, DFM and Custom. Some firms mandate us across all three; whilst others may mandate us to help with solving a particular problem within the CIP.

### TECHNOLOGY ENABLED ADVISER SOLUTIONS

#### Advisory Portfolios

##### Core Growth x 5 including iShares Edition

- Your platforms
- Your track records
- Your materials
- Your colours & fonts
- Your risk profiler
- Co-branded
- Cost efficient
- Dynamic management
- Smart re-balancing
- Increased diversification
- Legacy solution
- Low maintenance

#### CIP in a box

##### PAM DFM Portfolios

##### Core Growth | Sustainable | Income | Passive

- Your platforms
- Your materials
- Your risk profiler
- Our track record
- Built and managed by PAM
- Strategic and tactical AA
- Portfolio optimisation
- Smart re-balancing

#### Custom Mandate

##### Custom Built DFM Portfolios

- Your mandate
- Your models
- Your platform(s)
- Your branding
- Your materials
- Joint-investment committee
- Our permissions

#### ASSET MANAGEMENT IN A BOX

##### Our Unitised Fund Umbrella

- Joint Investment Committee
- Mandating Best of Breed Investment Managers
- Building Custom MPS using your funds and others
- Your mandate
- Your funds
- Full materials / documents
- Full scale enabling tech

## PLEASE GET IN TOUCH



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**FOR MORE INFORMATION ON  
PAM'S TECHNOLOGY ENABLED  
ADVISER SOLUTIONS**

**PLEASE SCAN THE QR CODE**



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**P>CIFIC**  
ASSET MANAGEMENT

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