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George Walker
head of investment sales
Colonial First State

A heritage of delivering world-class investment solutions to the local investment community

Through Colonial First State Investments, financial advisers can gain exclusive access to leading global fund managers, stay on top of the latest market insights and get hands-on support with portfolio construction.

Colonial First State's (CFS) Investments retail service offering brings together a range of institutional-quality solutions for Australian financial advisers and their clients.

To do this, we have assembled a diverse group of leading global institutional fund managers to provide Australians with world-class investment solutions. Each of our external Alliance Partners and in-house multi-manager products bring a unique investment capability to the table that allows advisers to develop complete, robust solutions for their clients.

In addition to providing Australian retail investors with access to these previously institutional-only funds, we provide advisers with direct access to the knowledge housed in these top global investment firms.

The CFS Investments offer extends beyond simply introducing great global fund managers to Australian advisers; we also provide hands-on practical portfolio management guidance and educational opportunities sourced from both our Alliance Partners and experienced in-house multi-manager team.

Exclusive partnerships: access to world class expertise

CFS Investments has access to some of the world's leading institutional asset managers, but only a select few meet our specific criteria and pass the extensive due diligence process.

- Currently, the exclusive list includes:
- Acadian Asset Management – a Boston-based, global, quantitative, investment manager specialising in active long only, long short and managed volatility equity strategies
 - Affirmative Investment Managers (AIM) – the world's first global fixed income manager focussed on delivering mainstream market returns with impact
 - Aspect Capital – a London-headquartered pioneer in systematic investing, offering medium-term trend following and alternative risk premia investment solutions
 - Baillie Gifford – an independent investment manager based in Scotland that's focussed on the long-term, with an investment philosophy in equities that's motivated to seek growth opportunities within a global universe
 - Generation Investment Management – a London-based manager specialising in sustainable global equity investments

- Milliman – global risk management specialists that help design investment strategies targeting better retirement outcomes.

Typically, these managers only deal with large institutional clients, but CFS Investments brings their insights and strategies to financial advisers in Australia.

Under the CFS Alliance Partner arrangement our managers share their knowledge with advisers via multiple channels such as boardroom sessions, webcasts and one-on-one meetings.

Market intelligence: Supporting advisers and their clients

Australian financial advisers operate in an increasingly complex environment that demands a high level of expertise across multiple areas.

As well as keeping up with products, platforms and portfolios, advisers must stay on top of ever-changing regulations, market conditions, technical strategies and day-to-day business issues. They also need time for the most important task of all: working closely with clients to help them build a better financial future.

Advisers who partner with CFS Investments have access to the breadth and depth of our knowledge-base that has been developed over decades.

We offer advisers in-depth insights on more than just investing.

Across the organisation we have centres of excellence in platforms, portfolio design, markets, regulation, superannuation, adviser education and technical information.

We also organise our collective store of market intelligence in an integrated fashion rather than separate 'silos'. Advisers can tap into whatever services they require through a single point of contact, including:

- Direct access to investment and market insights of our global, institutional quality Alliance Partners and in-house multi-manager teams
- Educational opportunities such as by-invitation study tours, professional knowledge-sharing and networking events or the chance to participate in our 'CFS Adviser Academy'
- Guidance on best-practice investment standards
- Practical business tools like our technical query hotline, FirstTech (available to CFS platform clients) or, where appropriate, the advisory practice benchmarking and client segmentation system, DNA.



The quote

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Design principles and practice: building better portfolios with institutional-strength construction tools

Financial advisers can get more out of CFS Investments than just access to a reputable source of market insight and education. We also provide another level of hands-on support with portfolio design, construction and implementation.

CFS Investments can put leading-edge institutional portfolio management techniques on the table for any financial advisory business.

We can help advisers build style-agnostic investment portfolios designed to suit the needs of their unique client base – and offer ongoing guidance on construction and implementation.

Financial advisers can also tap into experts within our in-house multi-manager business to help define their own investment approach.

Furthermore, CFS Investments has a suite of technology available to guide advisers through the portfolio design and management process, covering:

- Tools to streamline the investment review process
- Third-party software to assess clients' portfolios risk and return against investment objectives and test alternative portfolio versions before implementation.

Whether it's through direct access to leading global market knowledge, modern portfolio management expertise, investment implementation solutions or professional networking and educational opportunities, CFS Investments is ready to help Australian advisers and investors reach their financial goals. **FS**

Disclaimer: This article is directed at investment professionals for general information use only with no consideration given to specific investment objective, financial situation and particular needs of any specific person. Investment involves risk. Past performance is not indicative of future performance. The views expressed in this article are those of the speaker, and are subject to change at any time.

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