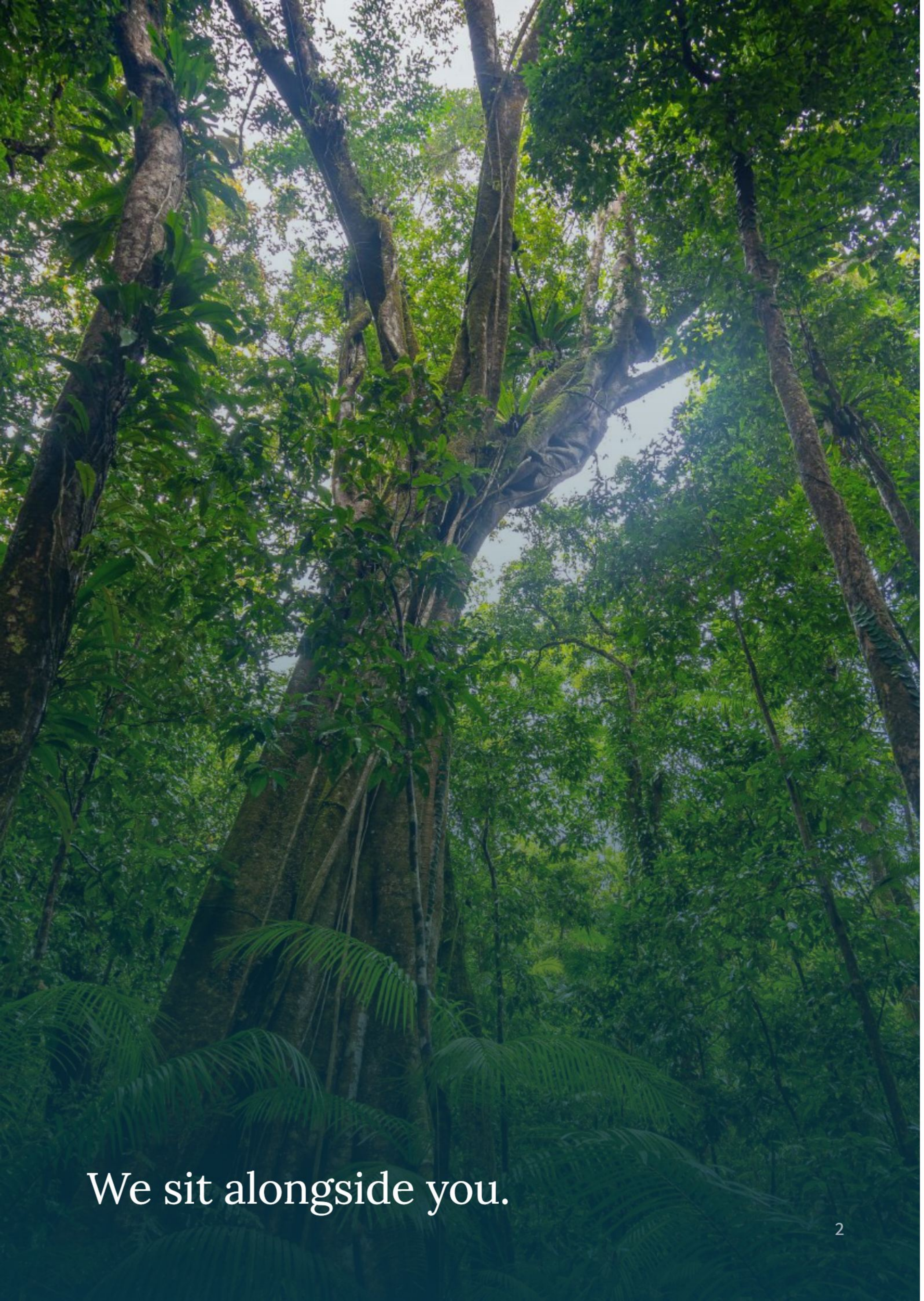
INFINITY

WHOLESALE CLIENTS ONLY

Private Portfolios

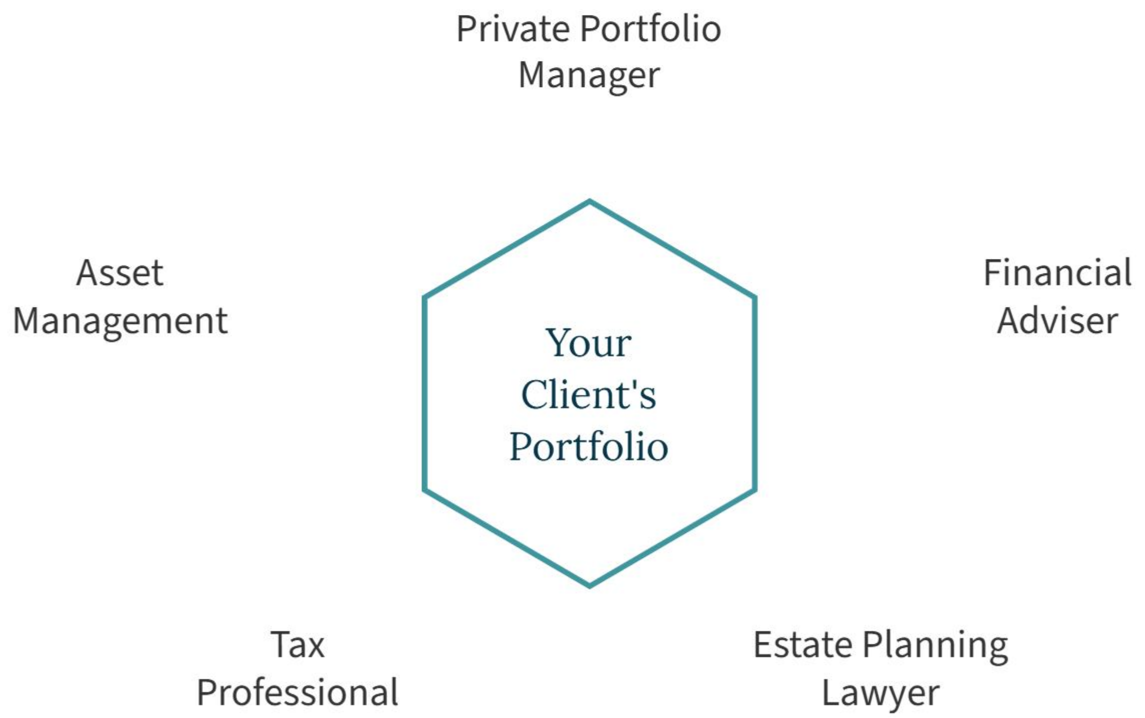
Discretionary portfolio management for wholesale clients

OVERVIEW FOR ADVISERS · 2026



We believe collaboration delivers the best outcomes for clients.

A dedicated Private Portfolio Manager, backed by the institutional capability of the Asset Management team, works alongside your client and their professional advisers to construct a truly tailored portfolio. It is actively managed over the long term as objectives, preferences and tax circumstances naturally evolve. We believe this collaboration delivers the best outcomes for clients.



Every portfolio is backed by institutional investment capability.

Every Private Portfolio is built on the same foundation institutions rely on. The Asset Management team brings more than 130 years of combined market experience and manages over $5 billion for advisers and their clients.

Portfolios begin with our highest-conviction insights: diversified strategies across each asset class, tailored to each family's objectives, existing assets and preferences. Where it adds value, we broaden the universe with selected alternatives and private assets that improve diversification and risk-return potential.

130+	$5B+	IMAP
Years of combined market experience	Managed for advisers and their clients	Multi-award winning and regular finalist with the Institute of Managed Account Professionals

Institute of Managed Account Professionals. Figures current at June 2026 and subject to compliance verification before external use.

Who Private Portfolios is built for.

The service suits clients seeking:

- An individualised, tax-aware portfolio
- Active, discretionary portfolio management
- A single-entity or multi-entity approach
- Access to alternative and private market opportunities
- Long-term wealth preservation
- Income focused equity portfolios

It is built for every entity type:

- Individuals
- Family, unit & testamentary trusts
- Private & public foundations
- Companies
- SMSFs
- Not-for-profits

WHOLESALE CLIENTS ONLY

The Private Portfolios service is intended for wholesale clients only, as defined under sections 761G and 761GA of the Corporations Act 2001 (Cth).

MINIMUM PORTFOLIO

A minimum portfolio size of $1 million applies per investing entity.

What clients and advisers value most.

Key features

1 **A dedicated Private Portfolio Manager**
One direct point of contact for client and adviser.

2 **Consolidated multi-entity reporting**
One clear view across every entity, in a single suite.

3 **Truly tailored portfolios**
Discretionary management to each tax-aware mandate.

4 **Institutional-grade capability**
A direct line to our award-winning research team.

5 **Income focused equity portfolios**
Equity income strategies targeting smooth and regular income.

6 **Hands-free setup and admin**
We handle setup, transfers and ongoing administration.

7 **Transparent, competitive pricing**
Full service, with 100% of manager rebates passed to clients.

A clear mandate, and ongoing active management.

The client journey begins by taking time to understand their unique requirements.

Most families invest across multiple entities. We set a tailored mandate for each one, shaped by goals, risk tolerance, time horizon, return expectations, cashflow, liquidity, tax and investment preferences. Every portfolio works to its own purpose while serving the family's overall objectives.

1 **Identify and qualify**
The client is confirmed as wholesale and seeking an actively managed solution.

2 **Understand and propose**
We learn the client's objectives and existing investments; portfolios are proposed, refined and agreed.

3 **Set up and implement**
We manage account setup and asset transfers via Limited Power of Attorney, then implement over one to twelve-plus months.

4 **Active portfolio management & regular reviews**
Reviews are tailored to adviser-client preferences: typically quarterly, plus a tax-planning meeting.

Start the conversation.

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