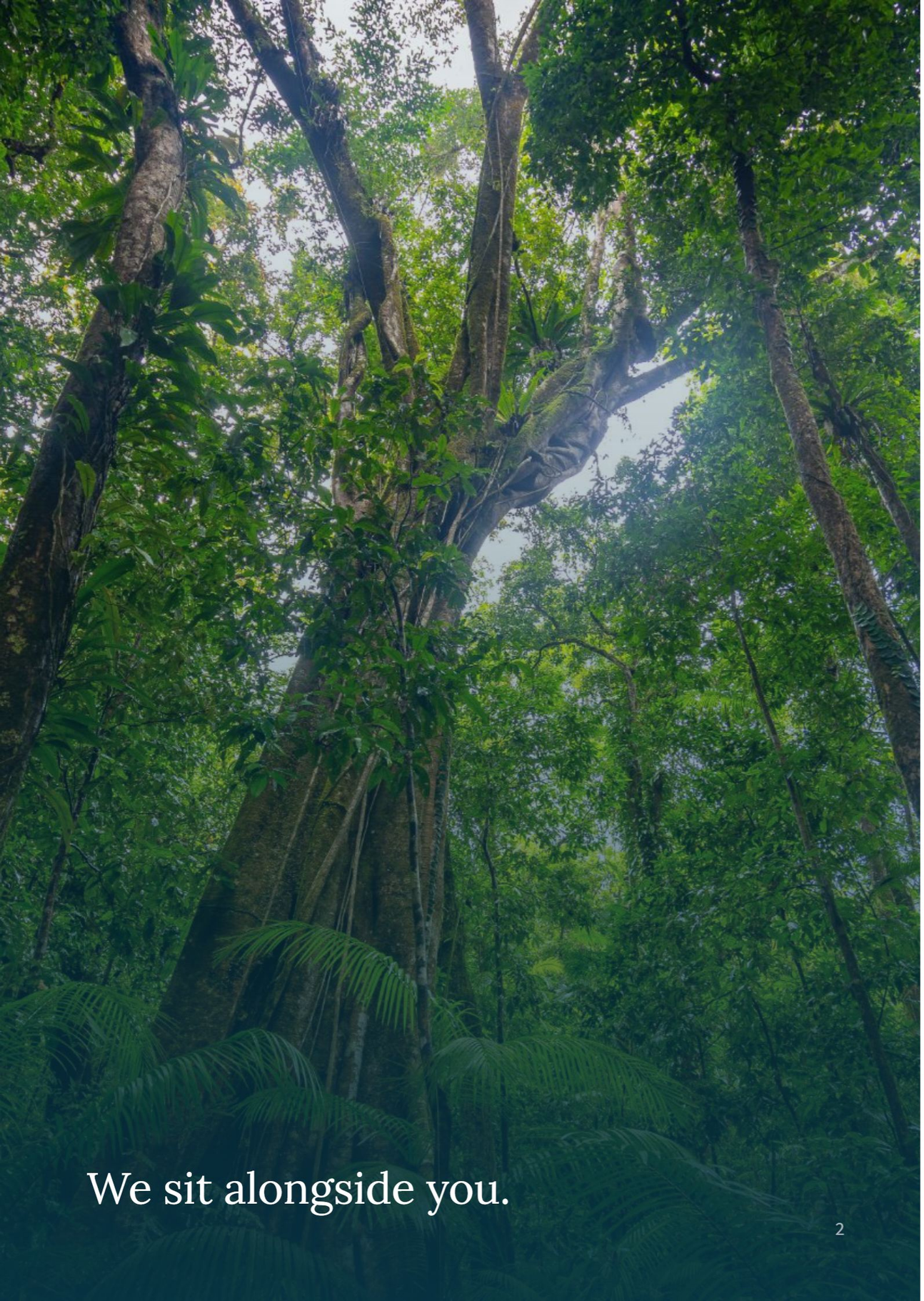
INFINITY

WHOLESALE CLIENTS ONLY

Private Portfolios

Discretionary portfolio management for wholesale clients

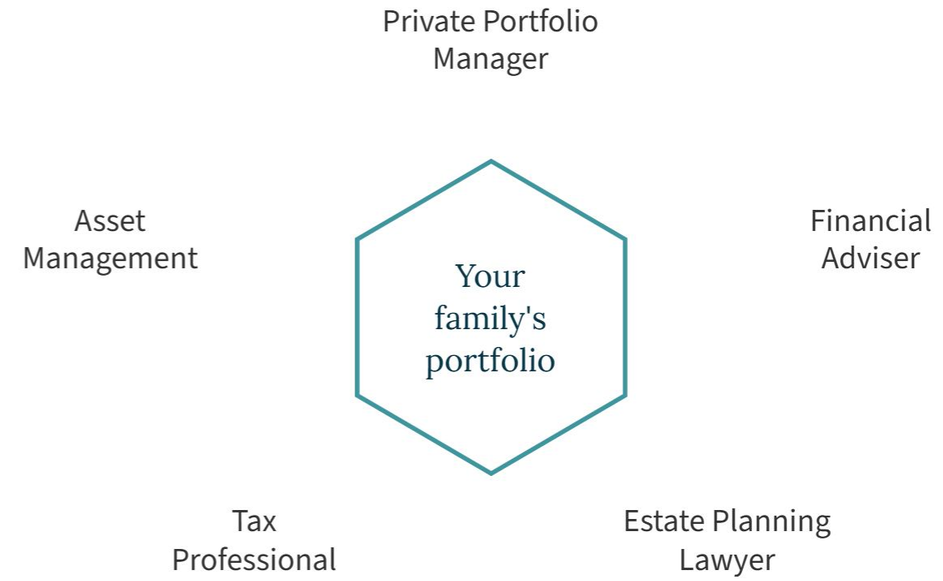
OVERVIEW FOR WHOLESALE CLIENTS · 2026

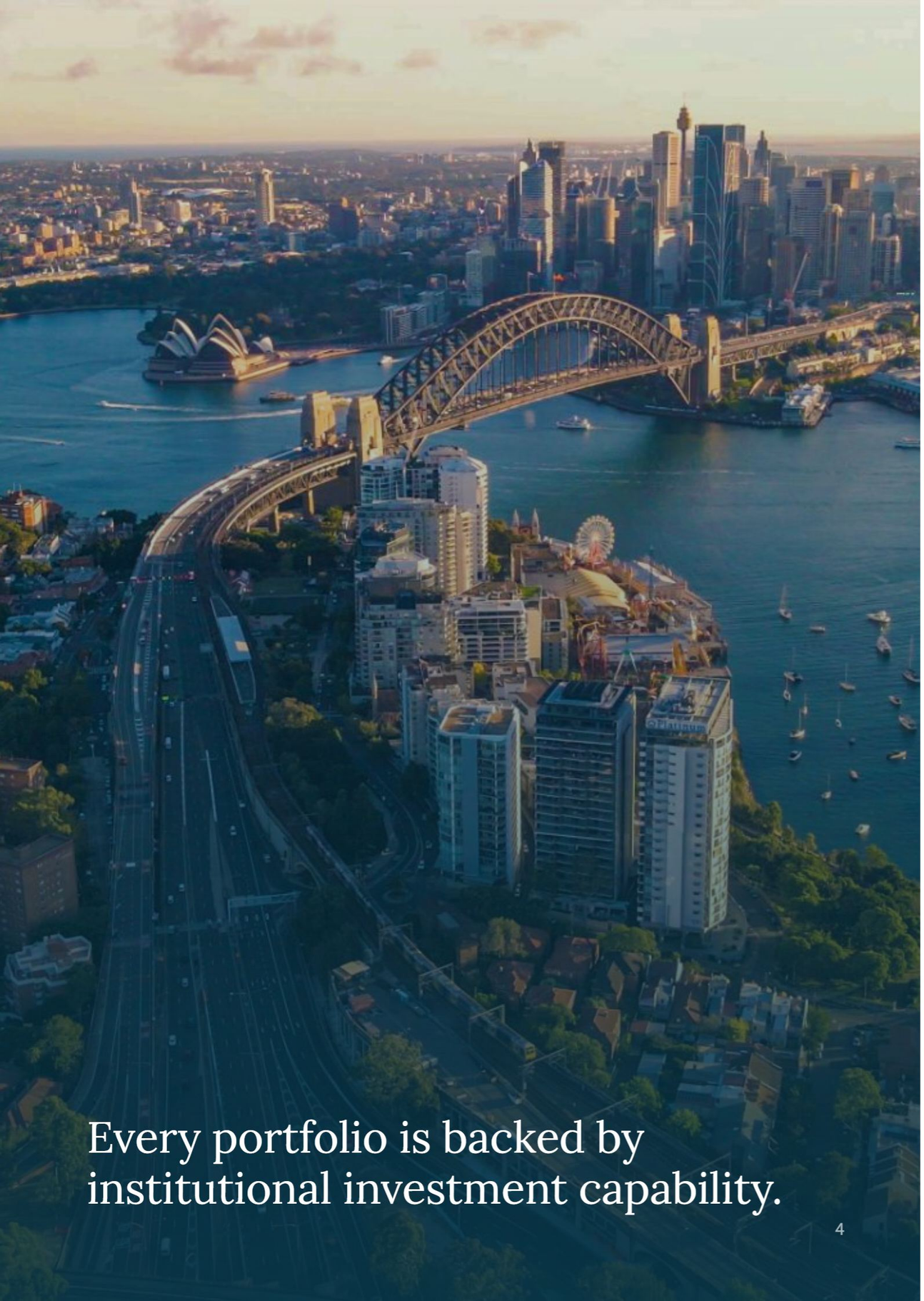


We sit alongside you.

We believe collaboration delivers the best outcomes for your family.

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





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 clients and their advisers.

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 clients and their advisers	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.



Built around your unique objectives and preferences.

Who Private Portfolios is built for.

The service suits you if you are 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 you value most.

Key features

1 **A dedicated Private Portfolio Manager**
One direct point of contact for you and your 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 back to you.



A clear mandate, and ongoing active management.

Your journey begins by taking time to understand your 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 your family's overall objectives.

1 **Identify and qualify**
You are confirmed as a wholesale investor seeking an actively managed solution.

2 **Understand and propose**
We learn your 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 your preferences: typically quarterly, plus a tax-planning meeting.

Start the conversation.

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This brochure has been prepared by Infinity Portfolio Management Pty Ltd (IPM) ABN 95 666 790 227, a Corporate Authorised Representative (No. 1303118) of Infinity Capital Solutions Pty Ltd (ABN 41 621 447 345) (AFSL No. 515762) (ICS). The information in this brochure is intended for wholesale clients only, as defined under sections 761G and 761GA of the Corporations Act 2001 (Cth). It is not intended for, and should not be relied upon by, retail clients. Nothing in this brochure constitutes financial product advice, an offer, or a recommendation to acquire any financial product. Infinity Private Portfolios does not provide services to retail clients. It does not take into account any person's objectives, financial situation or needs. Taxation considerations are general and based on present laws, which may change; seek independent professional tax advice before acting. Current as at June 2026. Strictly confidential; not to be distributed without the prior written consent of IPM.