

Bespoke investment consulting services

Lonsec Research's investment consulting service leverages the depth and breadth of our investment product research to provide high-quality investment advice and solutions tailored to your needs. With one of the largest investment consulting teams in Australia, we combine high-conviction insights with our extensive portfolio construction expertise to help you deliver your investment objectives. Our goal is to give you greater confidence in your investment process, from the asset allocation decision right through to security selection and investment committee governance.

The Lonsec Consulting difference



One of the largest investment consulting teams in Australia

7 consultants with more than 65 years of combined industry experience.



Bespoke and flexible solutions

Personalised and flexible solutions that align to you and your client's needs.



Breadth and depth of research

Underpinned by expansive investment product coverage, combining our people and data.



Timely and actionable insights

Key research publications, online resources or our investment committee participation.



Relationships

Engagement and communications focused on long-term relationships.



Strategic partnerships

With global actuary Milliman providing specialist retirement advice and solutions.

How we work with you

01

Engagement and Scoping

Initial visit and meetings to determine capabilities, requirements, objectives and strategy.

02

Portfolio Review

Full review of your portfolio capabilities, including asset allocation, manager selection, market positioning & governance.

03

Tailored Solutions

Develop a tailored solution that fits your objectives with clear parameters for success.

04

Ongoing Advice and Access

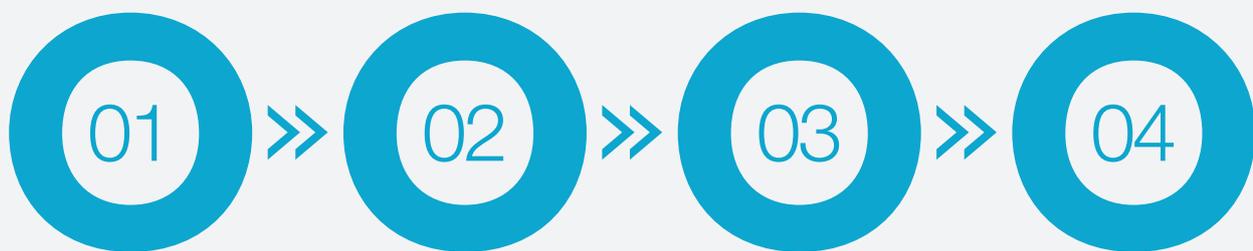
Hands-on assistance and advice to ensure the smooth implementation of our solutions.

We offer a bespoke and flexible investment consulting service tailored to individual requirements. We focus on building long term relationships with our clients and offering access to our manager selection and portfolio construction expertise irrespective of your business size.

Veronica Klaus

Head of Investment Consulting, Lonsec Research

Our end-to-end offering



Investment Committee Participation

Optimise your investment decision-making, gain fresh perspectives and receive ongoing support with our specialised asset allocation and portfolio construction expertise.

Approved Product List Construction

Create a high-quality APL based on different investment styles and goals including retirement specific APLs for yield, capital growth and risk control objectives.

Asset Allocation

Generate high-conviction, strategic and dynamic asset allocations supported by our strong quantitative and qualitative expertise.

Model Portfolios

Leverage the experience of the Lonsec Research team to deliver implementable, flexible and bespoke portfolios tailored to your objectives.

Want to find out more?

Get in touch today to find out how we can help empower your investment solutions. Call our Business Development Manager, Jasmine Miller on **+61 4 3109 6869** or email jasmine.miller@lonsec.com.au

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