

Phone: +61 2 4920 2877



(<http://dx.doi.org/10.6084/m9.figshare.11111111>) Murray+St,+Hamilton+NSW+2303/@-32.923667,151.747408,17z/data=!3m1!4m2!3m1!1s0x6b73144d333c0ebd:0xe243209c1f417963?

Stockbroking



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Full Service Stockbroking

The Pritchard & Partners Portfolio Management Service has been developed with input from clients to help them reduce their time and energies spent dealing with their investment portfolios.

This service is designed for individuals, joint arrangements, partnerships, companies, trusts and superannuation investors.

It is ideal for people who:

- Could use some additional time in their busy schedule
- Wish to focus more on investment and less on administration
- Want reliable, accurate and easily accessible information about their portfolios.

With a dedicated portfolio account manager Pritchard & Partners will provide:

- Comprehensive taxation reporting
- Annual reporting
- Dividends
- Trust distributions
- Capital gains
- Notifications to share registry
- Corporate action notification and processing
- Reporting on all investment income including tax breakdowns and franking credits

But most importantly it is fast and easy access to your information.

Premium Stockbroking Service

The Pritchard & Partners Premium Stockbroking Service allows you to work closely with your adviser to identify investment opportunities as they arise, ensuring the most effective investment decisions are made to improve your portfolio's performance.

Our services include:

Fee for Performance

Your adviser operates on a fee based remuneration structure linked directly to the value of your portfolio. Therefore, there is a greater incentive for your adviser to ensure the continued performance of your portfolio.

Tax Deductible Fees

Any management fees paid in respect of your portfolio would generally be tax deductible.

Brokerage Fee Transactions

As part of the Premium Stockbroking Services, you will receive 25 brokerage free transactions per year.

Quarterly Performance Reporting

Each quarter you will receive a comprehensive report detailing all of your transactions, income, realised capital gains and losses.

Half Yearly Performance Reviews

Each half year your adviser will review your portfolio with you to ensure that it continues to meet your needs and objectives.

Annual Taxation Re

Each year you will receive an annual taxation report, which will help you prepare your taxation return.

Cash Management

Pritchard & Partners Pty. Limited can arrange for regular transfers of income from your portfolio to meet your financial needs.

Portfolio Management Login (<https://members.praemium.biz/praeium/genericmain.aspx?gid=pritchard>)

[Login to Macquarie Wrap \(https://secure.macquarie.com.au/sepas/serve?NAME=unauthenticated&ERRCD_CODE=00000000&URL=/4/25-1-modern\)](https://secure.macquarie.com.au/sepas/serve?NAME=unauthenticated&ERRCD_CODE=00000000&URL=/4/25-1-modern)

TAM_OP=login&USERNAME=unauthenticated&ERROR_CODE=0x00000000&URL=%2Fpkmscdsso%3Fhttps%3A%2F%2Fwww.macquarie.com.au%2Fmg%2Fau%2Fpersonal%2Fmyhome%2Fauthzn&HOSTNAME=secure.macquarie.com.au&PROTOCOL=https

choose the right
team

Make sure your financial plans are heading in the right direction by talking with the team at Pritchards.



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(four-firm)

looking for a
smarter
tax investment

Pritchard & Partners has prepared investment portfolios that provide tax benefits particularly for professional business people.

For a free copy of the tax smart portfolio please contact a Pritchard & Partners adviser.



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