Perpetual Private

Asset Consulting

Guiding wholesale investors: Enabling better decisions, embracing superior solutions

Trust is earned.

Perpetual

At Perpetual Private we understand that wholesale investors have unique and complex objectives which often require tailored investment solutions.

Our goal is to assist our clients to successfully align their investments with their objectives to help them achieve better outcomes. Our investment experts are here to support you at any stage of your investment journey. From advice on investment governance, strategic asset allocation, manager and asset selection; through to implementation and reporting.

To assist you with achieving your objectives, we offer investors a true partnership approach with tailored advice alongside institutional grade investment solutions. We have worked closely with not-for-profits, native title trusts, family offices, universities, local government, and wealth managers.

We understand the unique challenges and opportunities our clients face and how they might impact investment decision making.

Our team has a proven track record in providing tailored investment advice that considers clients' specific needs and goals. We also understand the importance of ensuring that investments are aligned with both short-term and long-term objectives.

We believe that our experience, expertise and holistic service offering make us the ideal partner for you, and we are committed to providing you with the highest level of service and support.

A complete suite of services to optimise outcomes

For investors seeking to navigate the complex financial landscape with confidence, Perpetual Private Asset Consulting offers a range of solutions to help you make the most from your investments.

What we offer:

Investment governance advice: We can work with you to establish and maintain robust policies to ensure your investments are managed in an appropriate way as dictated by your time horizon, liquidity needs, risk tolerance and implementation considerations, combined with fully transparent portfolio and compliance reporting.

Capital Markets Research and Asset Allocation advice: The foundation for building a strategy that aims to achieve your long-term investment goals, with ongoing macroeconomic research and asset class views to help protect the corpus through turbulent markets.

Risk assessment and mitigation: Detailed scenario and risk factor analysis to help you gain more insight into the unintended risks that are not being rewarded in your portfolios.

Proprietary Manager Research: Our database covers decades of onshore and global manager meetings across institutional and boutique asset managers. As scale investors, our experienced team has access to restricted and emerging asset managers at discounted fee rates.

Responsible investment and values assessment: To help you make more informed decisions, we can undertake a comprehensive portfolio assessment to provide you with clarity on the impact of your portfolio. By leveraging this analysis, we can help you build impactful investment portfolios that not only align with your financial goals but also contribute positively to the environmental and social causes you deeply care about.

Outsourced Chief Investment Officer: working with your investment committee or team to tailor and implement investment solutions optimised for your needs, within your governance framework.

Implemented consulting: Your investment journey, streamlined

We understand that managing investments can be time-consuming and complex. For those looking for a partner to implement investments within the framework of your investment policy, we offer a range of implemented strategies to take the burden away, so you can focus on what truly matters.

How it works:

Comprehensive strategy execution: Our team will implement the investment strategy designed specifically for your unique needs, ensuring every detail is accounted for.

Efficient rebalancing: We maintain your desired asset allocation through efficient and thoughtful rebalancing, keeping your portfolio on track with your evolving financial objectives and the market environment.

Continuous portfolio monitoring: Stay ahead of the curve with our proactive approach, monitoring your portfolio's performance and making timely adjustments as needed.

ESG integration: Responsible investing is core to our investment approach and we undertake Environmental, Social and Governance due diligence as part of our manager and stock selection process.

Comprehensive reporting: Transparency and accountability are at the core of our service. You'll receive detailed and easy-to-understand reports, providing insights into your portfolio's performance and progress towards your investment objectives.

Why partner with Perpetual Private Asset Consulting?

Wholesale investors face unique challenges when it comes to achieving their overarching objectives, delivering consistent performance and contributing to the community.

The Perpetual Group is well placed to help meet a broad range of investment needs, drawing on:

- **Strength and depth** across our 20-person investment team ensuring our manager selection and monitoring processes are **rigorous** and **repeatable** which can lead to **better investment outcomes**.
- **Expert advice** delivering peace of mind for our clients through different market cycles. Our team's proven expertise is managed within a **robust governance framework**.
- **Unique** solutions allowing for **greater flexibility** and **adaptability** to changing market conditions.
- **Scale**, enabling us to provide our clients with access to managers and strategies that are typically only available to the very largest institutional investors, often at preferential rates.
- **Responsible investment expertise and analysis** helping our clients better understand the environmental, social and governance factors they are exposed to and how best to manage those risks and opportunities based on each client's mission and values.
- **Extensive experience in alternative investments**, building and managing alternatives portfolios for our clients, helping them navigate the complexities of this asset class.
- **Custom defensive portfolios** which can incorporate tailored ESG screens and credit rating requirements. Managed through our **cutting-edge technology platform**, we see a broad range of opportunities which can lead to better expected returns for our clients - particularly when compared with portfolios consisting of Term Deposits and bonds from only a few banks.
- **Investment implementation**, we manage a range of fund-of-fund strategies that provide a truly diversified exposure through world-class investment managers across geographies, strategies and styles.
- **Consolidated investment reporting** providing a comprehensive snapshot of all assets, offering investors a clear and concise view of their entire portfolio.

Perpetual Private Asset Consulting clients can also draw on the expertise of the broader Perpetual Group including:

- Direct cash and fixed income specialists, Laminar Capital
- Inhouse global investment management capabilities, that can be tailored or customised for portfolios with sufficient scale at favourable terms
- Globally leading ESG capabilities from Trillium Asset Management and leading ESG advisory house Regnan
- Accounting, tax and business advisory experts, Fordham

Additional consulting services: Grantmaking and philanthropy

Perpetual provides investment advice and philanthropic services to many individuals and families and today manages more than $3.3 billion in philanthropic funds (as at 30 June 2023).

This unique combination of experience means we can bring our insights to bear for all our clients. We offer that insight through wide ranging thought leadership and tailored advice from a team of philanthropy experts. Specialist consulting services include:

- **Grantmaking:** This service for foundation, not-for-profits and philanthropists provides access to Perpetual's grant making team who manage one of Australia's largest open grant rounds. Allow us to relieve the administrative burden and deliver a best practice granting service for you using our inbuilt grantmaking tools, systems, governance and processes.
- **Philanthropy strategy:** Our philanthropy strategists can support you to define and articulate a clear and implementable multi-year philanthropy strategy or to review and update existing strategic plans.

To find out more about Perpetual Private Asset Consulting, please contact:

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