

Get your
super fund
into top gear



Quantum Portfolio™

A SIMPLE WAY TO
LEVERAGE INTO SHARES
AND MANAGED FUNDS



Reasons to invest in a Quantum Portfolio

ACCELERATE YOUR POTENTIAL INVESTMENT RETURNS

1.

MINIMISE TAX BY GENERATING ADDITIONAL INCOME AND FRANKING CREDITS

2.

SELECT THE GEARING LEVEL THAT SUITS YOU

3.

CHOOSE FROM A WIDE RANGE OF SHARES AND MANAGED FUNDS

4.

FULL TRADING FLEXIBILITY - BUY AND SELL WHEN YOU CHOOSE

5.

LOW COST WHEN COMPARED TO TRADITIONAL FORMS OF BORROWING WITHIN SUPER

6.

A UNIQUE WAY TO BORROW TO INVEST WITHIN AN SMSF

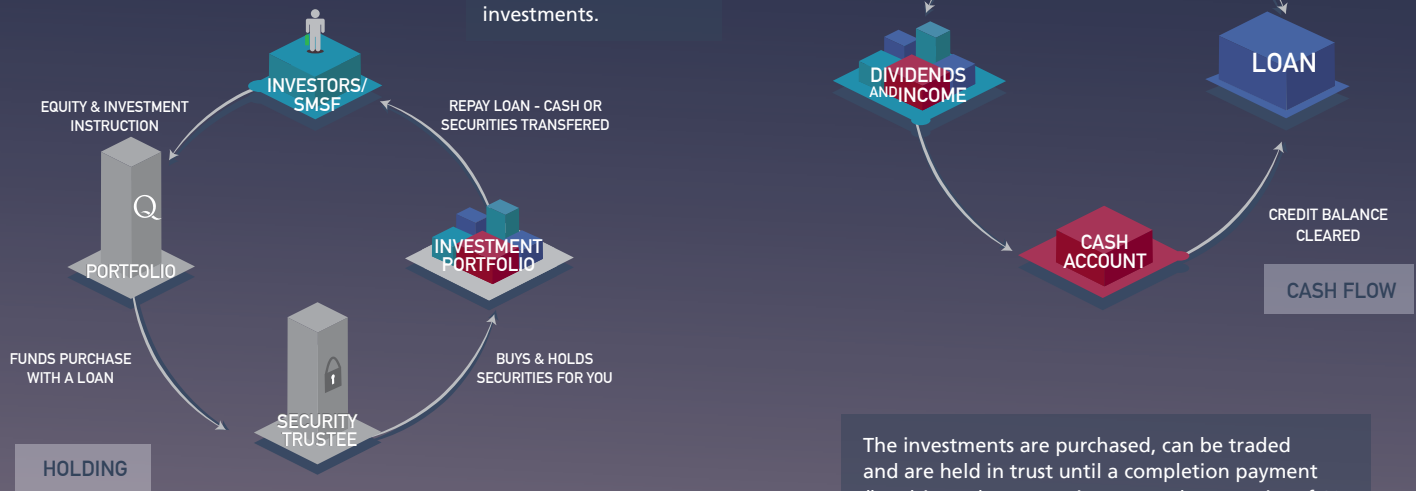
7.

Quantum Portfolio is a simple way to multiply your investment power. Borrowing to invest allows you to invest more in shares and managed funds than just using your own funds. With a greater amount invested, you have the potential to accelerate your investment returns and minimise tax within your super fund, allowing you to build long term wealth.

Investing in a Quantum Portfolio is a convenient way of borrowing to invest in shares and managed funds to accelerate investment returns and minimise tax.

How does a Quantum Portfolio work?

A Quantum Portfolio transaction comprises a share portfolio or managed fund investment, a loan to help fund it, interest payments on the loan and income from the investments.



The investments are purchased, can be traded and are held in trust until a completion payment (loan) is made, at any time up to the maturity of 10 years. The investments or surplus proceeds can then be transferred to the investor.

WHY INVEST IN SHARES?

Shares and managed funds have always been an attractive investment and an integral part of a balanced portfolio. Borrowing or saving to fund your investment can be complicated and time consuming.

WHO CAN INVEST IN A QUANTUM PORTFOLIO?

Trusts, individuals, companies and superannuation funds can borrow to leverage their investment – simply, legally and prudently.

WHAT TYPE OF SHARES AND MANAGED FUNDS CAN I INVEST IN?

You can invest in wide range of listed shares and managed funds.

IS THIS A SUITABLE INVESTMENT FOR ME?

Quantum Portfolio suits investors with a positive long-term view of the share market or managed fund and who want to borrow 0–70% of your investment.

DETAILS AT A GLANCE

MINIMUM INVESTMENT	\$30,000
BORROWING LEVEL	0 - 70%
TERM OF INVESTMENT	Medium to long term (5-10 years)
MATURITY	Up to 10 years from issue
DIVIDEND INCOME	Received by the investor
INTEREST	Fully tax deductible
CAPITAL GROWTH	Related to the underlying share or managed fund
OWNERSHIP	Full beneficial ownership of the shares or managed fund
RISKS	Investor will have the risk generally associated with a leveraged share or managed fund investment

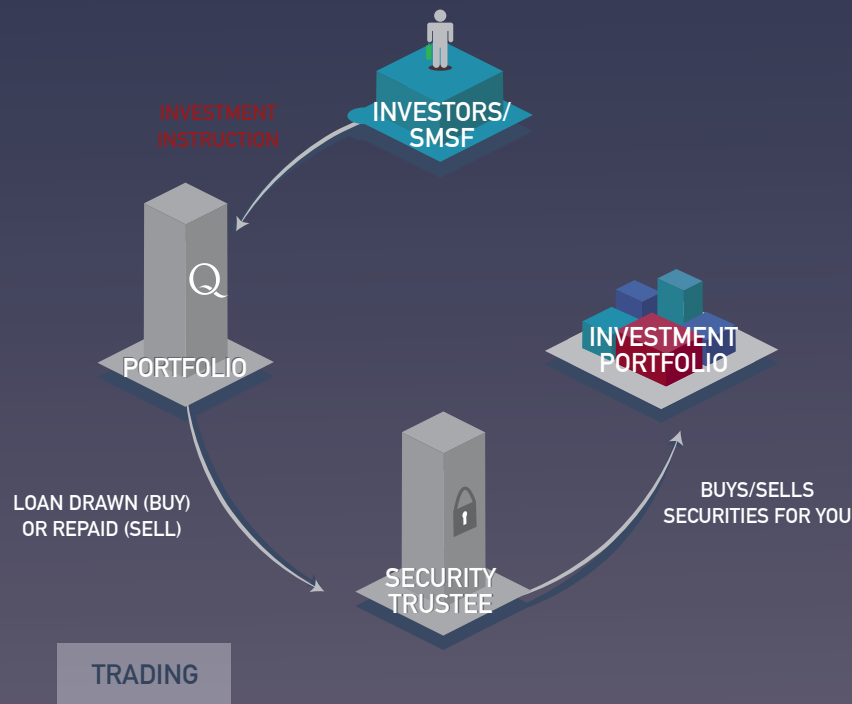
Key Features

- ✓ Ability to increase the investable funds within your superannuation fund
- ✓ Ability to increase diversification
- ✓ Access the benefits of dividends, franking and tax deferred distributions on the total investment amount without having to contribute the full investment amount
- ✓ Potential to use excess franking and interest deductions to offset contributions and earnings taxes
- ✓ Extensive choice of shares and managed funds
- ✓ Ability to trade Approved Securities
- ✓ Ability to create a "self funding" position such that expected dividends exceed interest expense, leaving the excess available to reduce your debt
- ✓ Competitive interest rates and low facility fees
- ✓ Consolidated reporting (with online access) on all transactions, investment holdings, obligations, dividends, distributions and interest

Quantum Portfolio may be a suitable investment if you:

- ✓ Consider shares and managed funds are a good medium or long-term investment
- ✓ Would like greater dividends, with tax deductions
- ✓ Would like to tax-effectively build long-term wealth
- ✓ Want gearing with lower levels of risk
- ✓ Have a self-managed super fund

You select your investments and you can trade in and out of these investments as desired



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