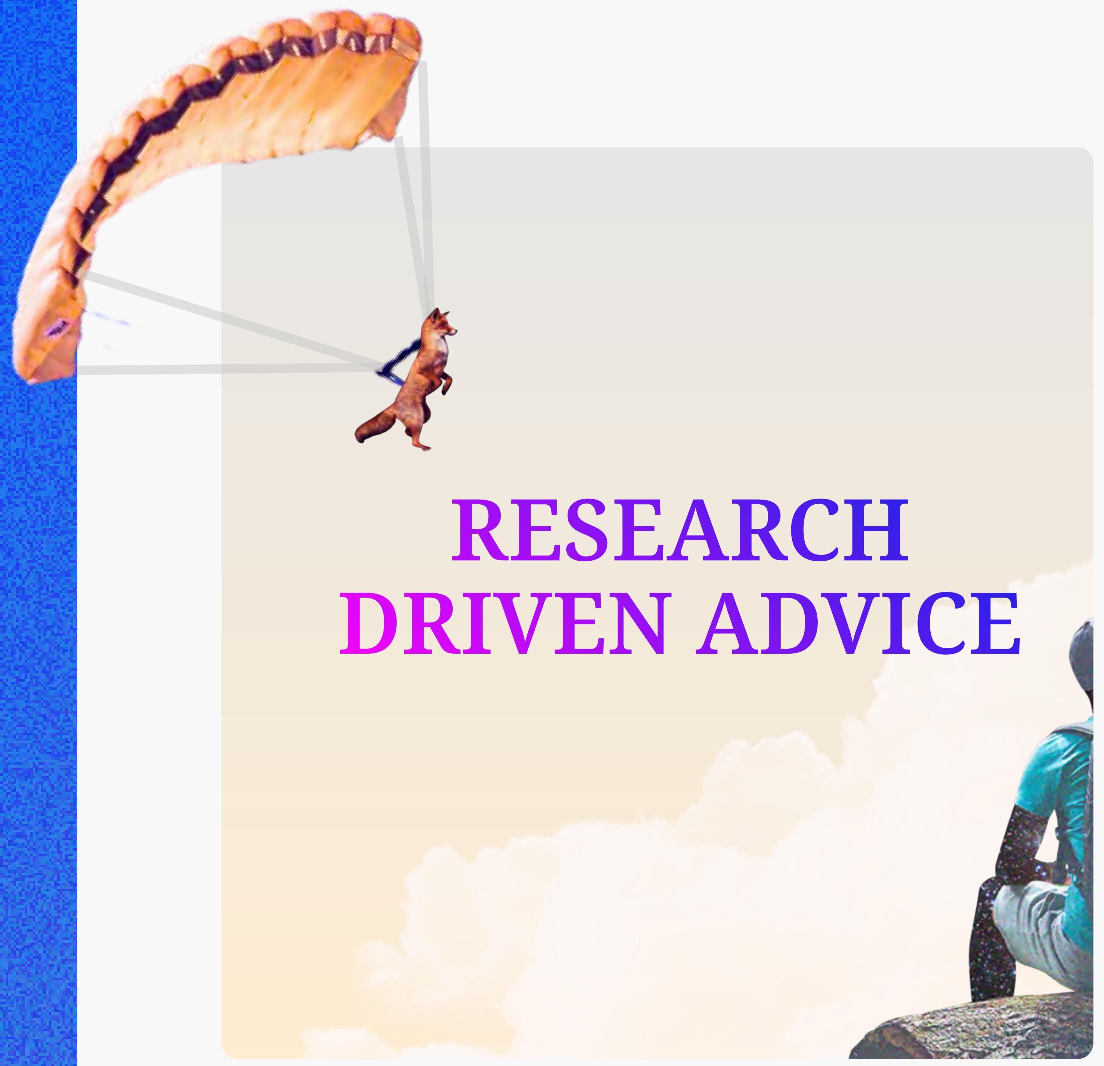
BlueRock

BlueRock Investments

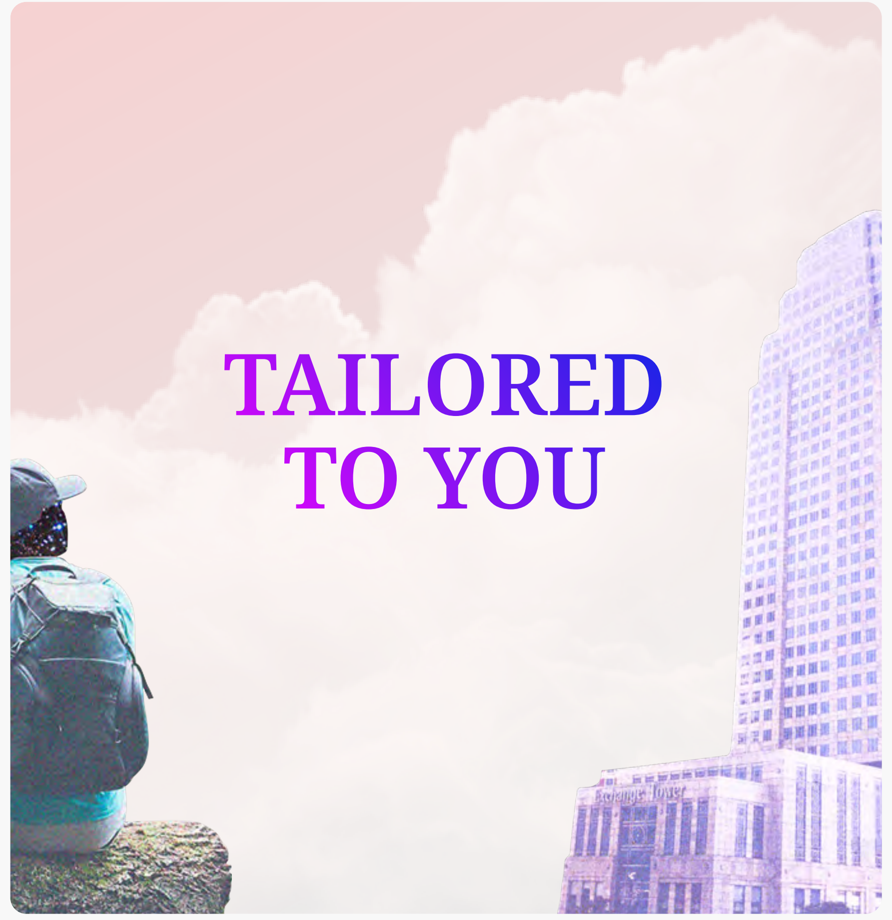
Providing specialist advice, with a personal approach, so that good things happen.

Foundation of Your Investment



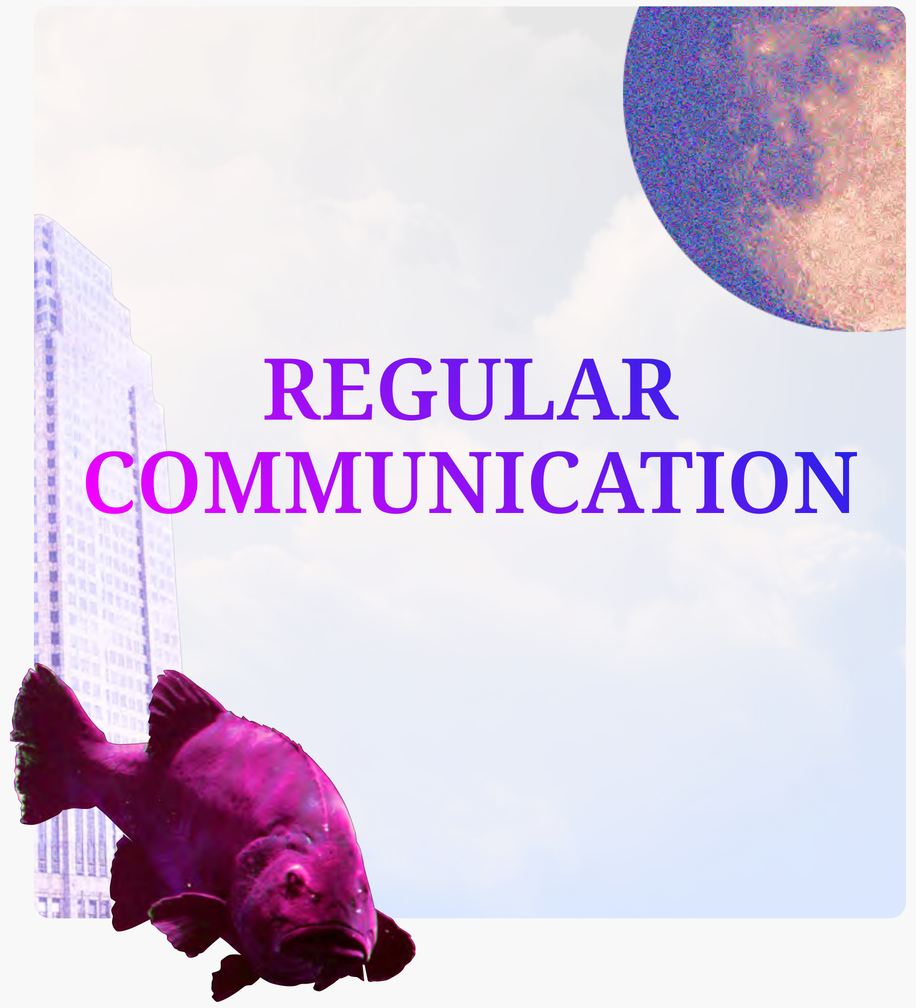
RESEARCH DRIVEN ADVICE

- Extensive market research combined with global views from trusted research providers.
- Crafted investment philosophy that incorporates the right mix of blue chip Australian shares, listed property trusts, international funds and debt instruments.



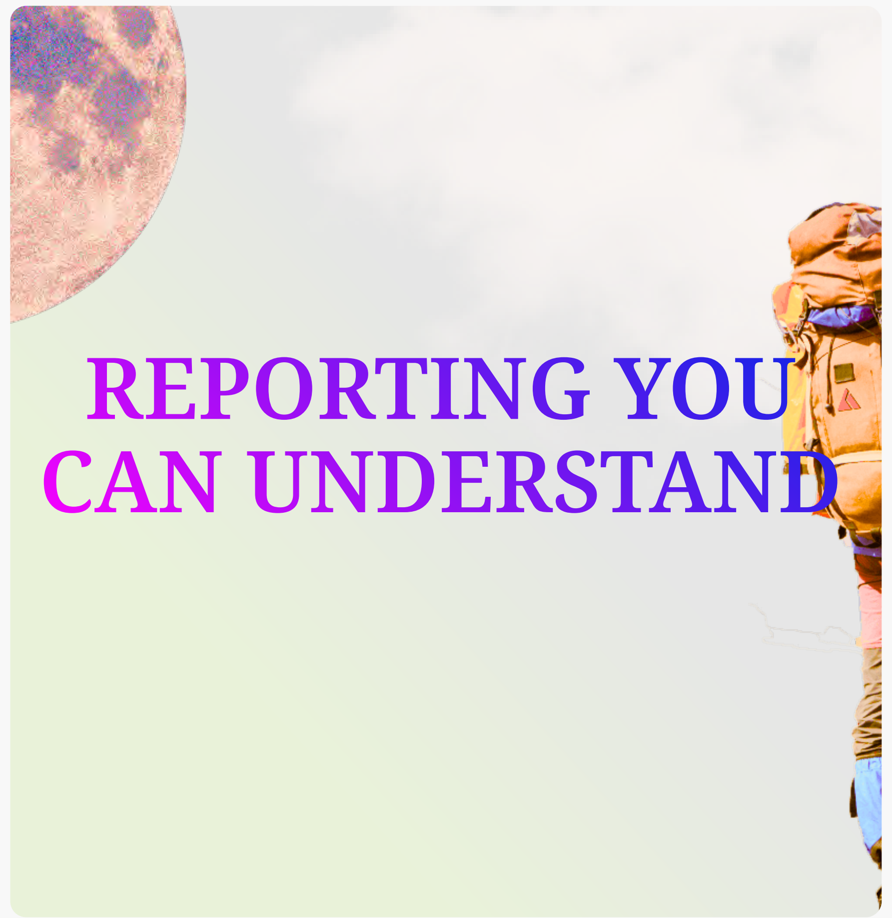
TAILORED TO YOU

- Generate regular income from an investment portfolio suited to your risk appetite.
- Provide the opportunity to realise personal goals and wealth creation.



REGULAR COMMUNICATION

- We connect with clients every one, two or three weeks through phone calls and weekly emails.
- Consistent portfolio reviews.
- Meticulous performance and tax reporting services.



REPORTING YOU CAN UNDERSTAND

- Real time access to Trading and Investment Platforms.
- Full year financials generated for tax reporting purposes.
- We take all the administration out of your hands and provide a comprehensive tax pack to support your accountant.

PEOPLE LED

- A team of people so you always have someone to talk to.
- Very experienced and technical advisors to ensure you get the right advice.

The Challenge

We understand that often people are time poor and are not sure where to start on their Investement journey.

Or really understand the markets but don't have the time to devote to it!

We recognise that some advisors don't put their clients first and are not truly independent.

This makes the investment decision often overwhelming.

People worry about making the wrong choice.

How We Can Help

BlueRock

REAL PEOPLE YOU CAN TALK TO

We work tirelessly to maximise returns while always bringing a personal approach to working with you.

- You will always have someone you can speak to in person.
- You can work directly with the advisor on your investment strategy and own the investments directly.
- We specialise in asset allocation and investment management for high net worth individuals and their families.
- We have a track record of consistent outperformance in the markets and our model share portfolio has delivered strong returns. (Past returns are not an indicator of future returns)

OUR INVESTMENT PHILOSOPHY

Our core investments are selected to generate regular income, and are focused on blue chip Australian shares, listed property trusts, international funds and debt instruments.

- Focus on income generating stocks means our portfolios generally have less volatility than the share market as a whole
- Grow the value of client assets over time through regular portfolio reviews, asset allocation, investment selection and meticulous performance and tax reporting services.

VALUE PROPOSITION

We offer a high level of personalised attention and direct access to our Advisers' expertise.

- Provide tailored advice based on research of domestic shares and international markets
- Our advice is based on our clients' risk appetite and research from a diverse list of Investment Banks and research organisations
- Invest funds directly into the market to charge lower fees than investment banks and wrap style investment platforms

INVESTMENTS ARE HELD IN YOUR NAME NOT ON TRUST

All investments are held by you or entities controlled by you giving you absolute control over your money.

How we work

Initial client meetings involve informing clients about what we do and how we do it. We capture vital information about clients to assess their tolerance for risk, investment objectives, ownership structures and income requirements.

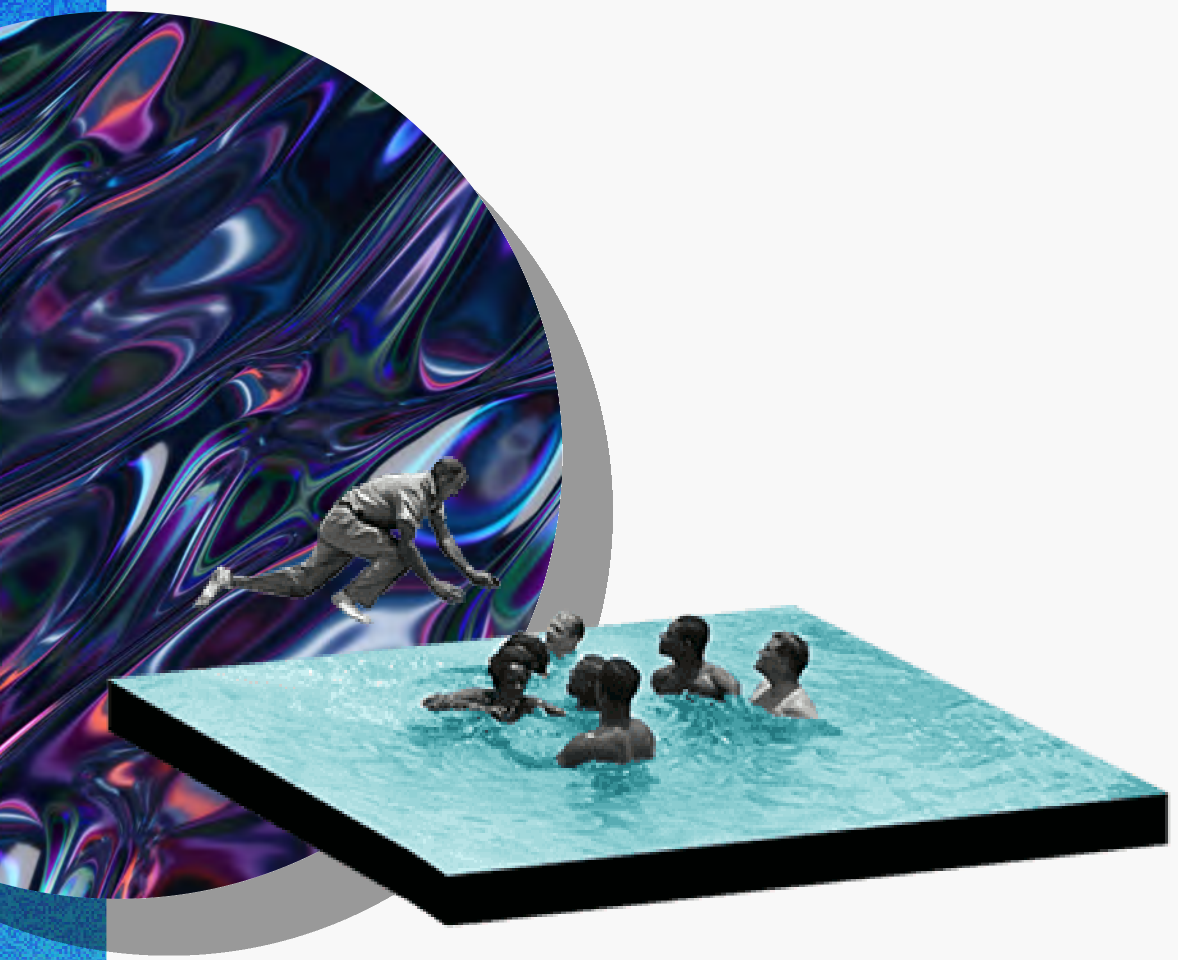
- Simple cost effective fee structure.
- Mapping out of a comprehensive investment plan that includes a proposed asset allocation, breakdown of investments and expected income to be generated.
- Investments held on separate HIN's with investment ownership in your name/entity ensuring security. Commonly invest through SMSF, Trust and Personal accounts.
- Predominantly invest via listed investments including Australian shares, International shares, listed property, listed infrastructure and listed hybrids and credit funds.
- 24/7 online Market and portfolio access.
- Access to a broad range of research and analysts.
- Regular reviews of your investment portfolios, with specific stock advice.
- We do not trade on your account on a discretionary basis.
- Full year financials are generated for you and your accountant.
- Wide access to market floats and IPO's.
- Continuous access to your experienced advisors that have delivered strong long-term returns.
- Daily market updates from our in-house team.

BlueRock

BlueRock Investments - Model Portfolio Returns Since Inception

Our Team

Each person in our team has 10 to 20+ years' experience in financial markets working at organisations such as UBS, Merrill Lynch, JP Morgan, Standard Chartered, Shaw and Partners and Macquarie Bank.



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How else BlueRock can help

BlueRock is a one stop shop for entrepreneurs and family groups.

From preparing your will, to helping with your tax and everything in between.

We operate our business with unique people led divisions, each specialising in a different stream of professional services aimed at helping entrepreneurial businesses and their founders.

At BlueRock, we believe we can solve any problem for our clients and support them with all their business and personal needs allowing them to achieve their goals.

BlueRock Divisions - Your New World Adventure Partner

BlueRock

ACCOUNTING

BlueRock's accountants take tax, compliance and reporting up a notch to create a true growth partnership. We act as your reliable business advisors, meeting with you regularly to maintain proactivity and strategically drive your business towards your goals.

LAW

Our legal eagles have a wealth of experience across all aspects of personal, business and commercial law (Commercial, Property, Employment, Litigation). Our multidisciplinary approach allows us to deliver quick turnaround times, consistent high-quality advice, measurable results and outstanding value.

PRIVATE WEALTH

Mapping out a clear financial future needs a team approach. So our financial planners, estate planners, insurance brokers and investment advisors collaborate on a smart strategy to help you accumulate and protect wealth, and meet your life goals.

FINANCE

From home loans to large-scale development funding, BlueRock Finance aims to make the impossible possible. We secure the right finance to bring your dreams to life and support you every step of the way on your business or property journey.

DIGITAL

Our Digital team harnesses the power of digital to drive growth for businesses. Our end-to-end service means we specialise in everything from digital strategy and optimisation through to web and app development, systems consulting, brand and marketing.

GRANTS & INCENTIVES

We're experts when it comes to government grants and tax incentives. If your company wants to do research and development, exporting or another innovative activity, we can help you recover expenses and get the money you need to grow with confidence.

SELF MANAGED SUPER FUNDS

Superannuation offers amazing opportunities for long-term wealth accumulation. Our SMSF specialists work closely with your accountants and finance team to plan and consolidate your financial future.

GENERAL INSURANCE

If you're in business then you most likely own assets – and that means risk. We seek out the best value insurance for your franchise properties, contents, vehicles and equipment, and tackle difficult claims for you.

INTERNATIONAL

BlueRock International offers specialised tax, business advisory and legal services for high-growth businesses or individuals operating in a global market. We help achieve your international growth goals by applying our expertise across multiple disciplines.

ON DEMAND

For busy SME business owners who want accurate accounts bolstered by strong business fundamentals, BlueRock On Demand provides integrated subscription services. Because choice, confidence and transparency are important as you scale.