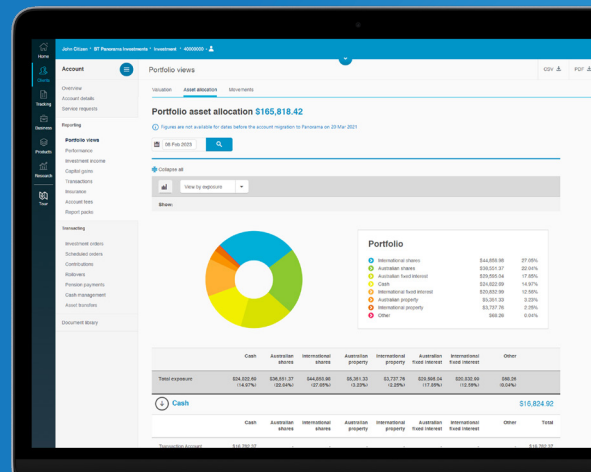


BT Panorama

Our experience.
Your advantage.



Delivering what clients want takes a platform that's been designed with a quality financial advice experience in mind. With BT Panorama you can benefit from intuitive technology and a wide range of features to make the advice journey simpler for you and your clients. Choosing BT – one of the largest and most experienced platform providers – also gives you access to an expert team dedicated to driving efficiency in your practice.



1. Enhance the advice experience

BT Panorama is a platform built for ease. Drawing on best-practice in user-friendly design, we've created a digital experience that's intuitive and makes tasks and information simple and accessible for users.

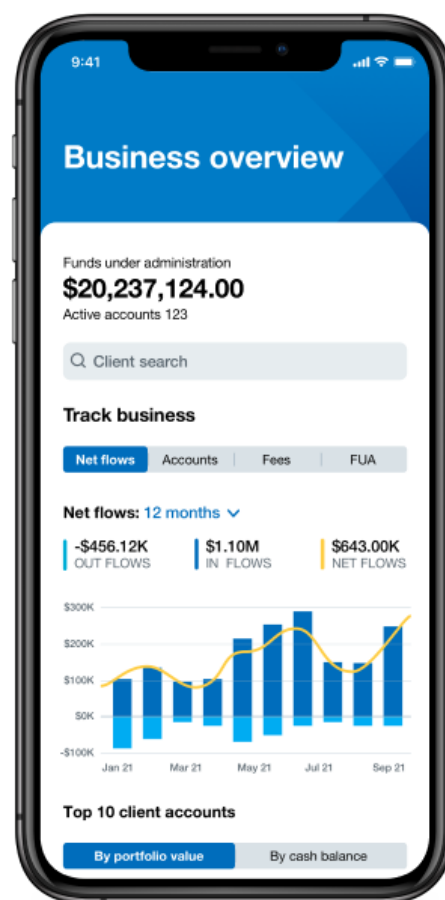
- Unlock the benefits of technology to create efficiency in your business, reduce friction in the advice journey and enhance the service offer to your clients.
- Your digital experience on the platform is backed by exceptional support from our dedicated customer service team.
- We'll help you identify ways to make the most of platform features and help you tailor BT Panorama to suit your workflows and client base.



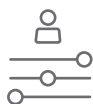
2. Advanced tools for online advice

With 2/3 of clients preferring the simplicity of an online advice experience¹, it's essential to offer a seamless and secure digital platform ecosystem.

- Save time and simplify the advice and investment process with digital workflows and consent for onboarding, approvals, transactions, reporting, ROAs and more.
- Access to select platform functionality and tasks on the go with the BT Panorama mobile app.
- Get real-time information on markets and investments, buy, sell and track orders and make payments, all within a mobile-friendly interface.



¹ KPMG 'Post-COVID-19: Insurance and wealth sector consumer trends' report, 2020



3. A market leader in managed accounts

BT Panorama offers a market-leading managed account solution, giving you and your clients access to a wide range of investment options from BT and other leading providers.

- With over 290² managed portfolio options to choose from, we have the portfolios to suit your clients' needs, or work with us to build your own bespoke portfolios.
- Expect greater transparency for your clients and more efficiency in your portfolio management – building better client engagement and giving you time back in your day.
- You choose how to integrate managed accounts into your advice offer and we'll guide you and your clients through the transition.



4. Collaborative and flexible

Designed to operate with other technologies, BT Panorama is built to integrate with your current stack and makes it simple and easy to share information and collaborate with accountants and other professionals supporting your clients.

- Easily transfer key data between software including XPlan and popular accounting technologies for simple processing and reporting.
- View and share tax statements and other important documents to deliver a complete picture of wealth and assets for your clients across their whole portfolio, including investments, SMSF and more.
- Options for data feeds or two-way data exchange for third-party service providers.



5. Backed by experience and scale

With over 50 years' experience in supporting financial advisers, our knowledge of compliance, security and technology have helped us build a platform that is a leader in the financial advice market.

- With 40% of active advisers currently using BT Panorama, we have the largest number of adviser relationships in the industry.
- With 40+ relationship managers on the ground and an award-winning customer relations team, you can expect fast response times for queries and requests.
- We use bank-grade security in technology, encryption and authentication methods – including SMS two-factor security and extend validation certificates – to safeguard data for all our platform users.

Get started with BT Panorama

Visit btpanorama.com.au or call us on 1300 784 207



² Not all portfolios offered on BT Panorama will be available to all clients.

Disclaimer

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