



Make your clients' investments go further with a JANA Wealth Partnership.

DEPTH WITH DIFFERENCE.

In uncertain times, your clients are relying on you to help them navigate and safeguard their financial future.

By partnering with JANA – Australia's largest investment consultancy firm – your advisory or wealth management firm can bring global research, analysis, insight and innovative thinking to your table. This means better, stronger outcomes – for your clients, and for you.

About JANA

For over 30 years, the team at JANA has been providing strategic and highly customised consulting services to investors across Australia and New Zealand. Today, we have long-standing relationships with a diverse selection of clients, including charities and endowments, long service leave funds, superannuation, life, health and general insurance, universities, financial advisors and wealth management firms.

Our approach – Depth with Difference – leverages our position as a majority management-owned, independent asset consultant. With close to 90 institutional clients and advising over A\$850bn, we rely on our structure, processes, tools and in-depth experience to deliver the best results for you and your clients, every time.

Unlock potential with our Wealth Partnerships service

As a financial advisor of a private wealth management firm, our Wealth Partnerships service can help you deliver superior investment outcomes for your clients. We can boost your own consulting capabilities - providing you with exclusive access to our deep pool of talent, global research, and renowned financial analysts.

With a team of over 80 research analysts, ours is the largest team in the Australian consulting market, and is focused on key investment priorities: capital markets, quantitative applications, responsible/ESG investments, and retirement strategies.

How it works

Talk to us about the Wealth Partnerships arrangement that works best for you and your client/s:



We offer flexible fee structures based on a scaled basis point fee arrangement (based on funds under management invested), or a fixed fee arrangement. We also operate with all the major investment platforms.

Why partner with JANA?



Full range of services – unlike some investment consultants who may provide a single managed accounts offering only, we provide access to a range of services to best meet your requirements. This includes portfolio construction, asset allocation, fund choice and implementation reporting.



Tailored relationship – we take the time to listen to your requirements, and those of your clients, and deliver highly customised advice and services. We never take a 'one size fits all' approach, and can cater for both retail and wholesale clients.



Broad research – with a broad base of clients with bespoke underlying investment products, our research is robust and diverse, and we often include products that our competitors do not, such as private equity, infrastructure and unlisted instruments – fit for wholesale clients.



Scale – our Wealth Partnerships service allows you to leverage JANA's buying power with fund managers, accessing investment strategies available to other institutional investors and underlying manager fee rebates, including wholesale fee arrangements with managers on JANA's preferred product list.

Find out more

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