

FirstNet Adviser - first choice for online functionality

2 February 2010



For the past two years, Colonial First State's FirstChoice has been rated best platform by financial advisers*, and it's not hard to see why. Through FirstNet Adviser it delivers online functionality that is in a class of its own.



As well as being judged best platform overall, FirstChoice has also been rated number 1 in a range of areas including functionality, client reporting and portfolio management tools†. Advisers also rate our content and usability above other platforms*.

FirstNet Adviser's suite of online tools simplifies client management allowing you to service your clients more effectively and efficiently, dramatically reducing your client administration time.

With sophisticated client segmentation, identifying and categorising existing clients is simple and effective. Client reporting tools allow you to produce and schedule reports across client segments and create tailored reporting templates. You can also create templates for your recommended model portfolios and manage multiple portfolios as one.

FirstNet Adviser has simple and easy online transactions and built in quality control functionality across switching, withdrawals and auto-rebalancing. Online calculators simplify the most common calculations such as transition to retirement, budgets, and personal super insurance.

With functionality like this, it's easy to see why Colonial First State's FirstChoice has been rated best platform by financial advisers.

To find out more or to arrange training, contact your Business Development Manager, call FirstNet Adviser Support on 1300 360 636 or visit colonialfirststate.com.au/fnadem

*Wealth Insights Service Level Survey 2008 & 2009. †Investment Trends Planner Technology Report, September 2009. FirstChoice is issued and operated by Colonial First State Investments Limited ABN 98 002 348 352, AFSL 232468 (Colonial First State). Please consider the relevant PDS and your clients' individual circumstances before making any investment decision.

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1. Anna | 2 February, 2010 at 02:28 PM
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