

The Strata Guardian Portfolios

Strata Guardian

With a recommended investment timeframe of **2+ years**, the Strata Guardian portfolio focuses on achieving a term deposit beating return over time (CPI +1% p.a). This portfolio is designed for medium term investment, whilst still available for draw down and switching to Strata Grow at any time.

Investment service fee of **0.4%** per annum.

Minimum Investment **\$20,000**.

Strata Grow

With a recommended investment timeframe of **5+ years**, Strata Grow is built to target higher levels of return in the long run (CPI +2% p.a) with a higher weighting of growth assets than Strata Guardian. This portfolio is designed for longer term investment, whilst still available for draw down and switching to Strata Guardian at any time.

Investment service fee of **0.5%** per annum.

Minimum Investment **\$20,000**.

Contact us for more information

We understand that this is an important decision for your body corporate and are here to help.

We have a presentation pack we can send you, along with arranging a remote introductory meeting at your next Owners Corporation, Body Corporate and Strata Corporation committee meeting.

You can also tailor and view a potential portfolio using our noobligation online onboarding portal, [available through our website](#).

To get started feel free to book a call back to discuss how we can help and answer any questions:

- Use the book a call feature on the contact page of strataguardian.com
- Email us at contact@strataguardian.com
- Call us on **1300 482 736** (Office number **03 7302 8888**)

The information in this document contains general information and does not take into account your personal objectives, financial situation or needs. Past performance is not an indication of future performance. Strata Guardian Pty. Ltd. (ABN 20 646 722 518) is a Corporate Authorised Representative of Strata Advice Pty Ltd - AFSL 528306.



A New Investment Approach For The Australian Strata Community.

How We Invest Your Buildings Capital

A Reliable, Accessible and Diversified Investment Solution

About Us

We recognise that your Strata or Capital Works Fund is like the superannuation for your building and needs to be managed carefully.

Your fund comprises many years of levies from members of the building, to help protect against large costs incurred needing to be funded by additional contributions or loans.

As bank interest rates have fallen over the years, the common cash account for your building is failing to provide a reasonable rate of return and in the long term may jeopardise its ability to cover your buildings costs and mean constant increases in your buildings annual levies.

Strata Guardian invests for the long term in diversified and liquid investments, to grow your buildings capital in a meaningful way and ensure that it is available when required.



Major Institutional Custodianship

All client capital is held a trusted and listed third party platform which is backed by a major Australian bank and global investment banks.



Bank Grade Security

Your account with Strata Guardian is protected by 2 Factor Authentication, Page Encryption and is held on Australian servers. Our identification service is used by major Australian banks and provides the strongest online ID verification service currently available on the market.



Diversified and Liquid Portfolios

Our investment team builds and manages your portfolio on an ongoing basis, using well-known exchange traded funds (ETF's) that give diversified exposure to global income and share markets



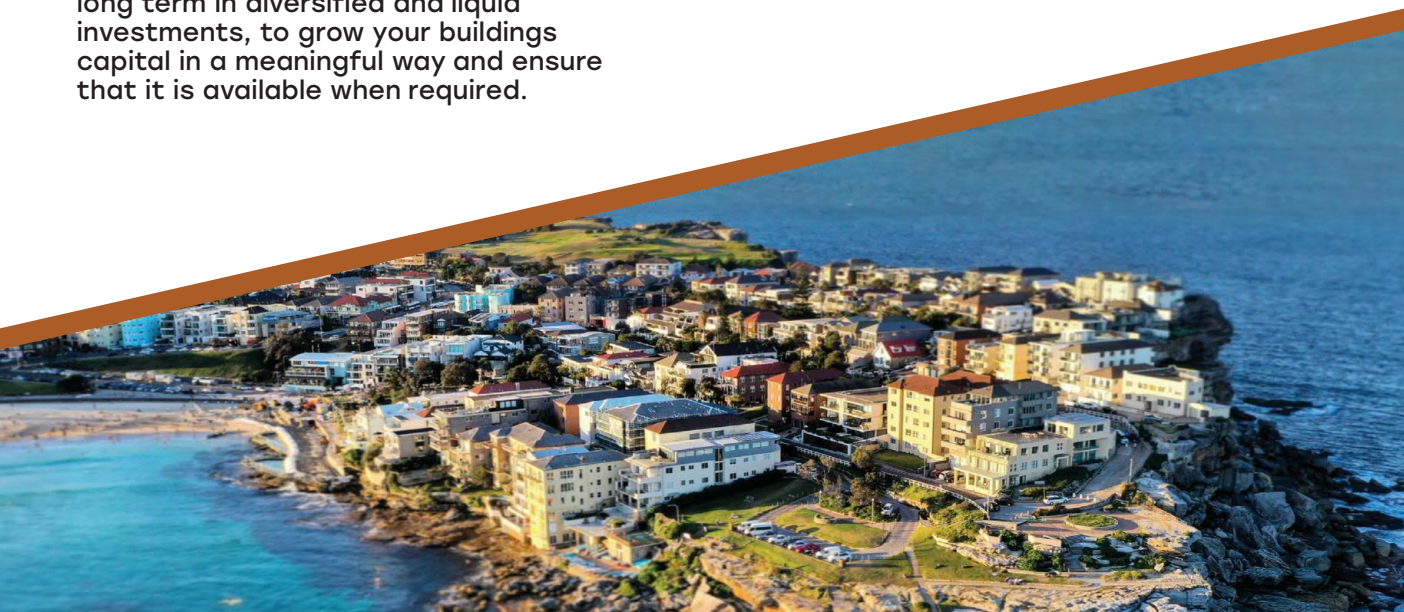
Easy Account Monitoring and Reporting

Your account is accessible for viewing and reporting anytime through the platform client dashboard. End of Financial Year financial reports are compiled and available for your accounting services as required.



Building Strata Investment Focus

Unlike other investment services, **Strata Guardian is designed with one job in mind, to target a reliable, risk adjusted return for Australian Strata and Capital Works Funds.** We only offer accounts to Australian Owners & Body Corporate entities. It is this focus that provides our investors and lot holders with the confidence that their priorities are in alignment with our priorities.



Strata Term

The Ultimate Term Deposit solution for Australian Strata Savings



Strata Term is a new service by Strata Guardian that provides access to market-leading Australian bank term deposits over a range of terms and interest rates.

Ensure your long term sinking or capital works funds are achieving the best returns available for your chosen term periods.

Banks often have rolling capital requirement needs, and will offer above market interest rates to achieve their immediate objectives. Strata Term can provide your scheme/plan access to over 25 trusted Australian Deposit Taking (ADI) institutions in a simple and secure manner for your committee.

Strata Term offers the ability to easily access and invest across over 25 banks and financial institutions in the one easy decision. Your scheme or plan always owns the capital and all term deposit's offered through this service are covered by the Australian Federal Government Financial Claims Scheme.

Both terms and accompanying interest rates are confirmed upon application. Strata Guardian can also provide an ongoing rollover service, that will target the best prevailing rate at the time for subsequent periods.

SUGGESTED TIME-BASED ALLOCATIONS



Strata Term compliments our existing services well (Strata Guardian & Grow), and is for committees who are looking for better returns on their cash savings, without taking additional risk.

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