

Let's play a game of 'Term Deposit - Would You Rather?'

Option 1: Do it yourself

1. Research and compare rates from five banks
2. Get an actual quote from your preferred bank (only valid for a few days) by phoning, visiting a branch, or possibly via the website
3. Open an account with your preferred bank, probably by visiting a branch or possibly online
4. Fill out forms and provide verified or certified ID documentation for AML purposes
5. Wait for this to be approved, potentially for days or weeks
6. Decide on the duration of the term deposit and accept the (possibly revised) rate
7. Monitor the term deposit until expiry and then decide whether to renew or roll over
8. Repeat steps 1 to 7 to check if there is a potentially better rate by a different bank



Option 2: Collinson Wealth Partners' managed term deposit facility

1. Register with Collinson Wealth Partners and ask them to do all this for you.

**Collinson Wealth
Partners offer
impartial, informed
investment advice
with only
clients'
interests
in mind**



When you choose Collinson Wealth Partners to manage your term deposit/s, you'll have access to a smart, secure online system and seasoned advisers with years of experience assisting investors just like you.

Save yourself time

- No more trawling websites, lengthy phone calls, or multiple branch visits
- A one-time-only registration with certified ID for AML purposes
- All your term deposit (TD) investment info to view online in one place at the same time
- Linked with a portfolio service, if desired /applicable

Save yourself stress

- Never worry that you've overlooked a potentially better offer
- Never miss a renewal deadline

Enjoy genuine peace of mind
Collinson Wealth Partners access competitive rates.

We can advise on the best rates at the TD's outset and research the latest rates before the TD matures, so you can decide whether to reinvest or roll over. Your investments are held by an independent custodian, Consilium, with strictly audited compliance and security standards.

Have confidence in our team's professionalism and transparency

We promise no surprises. Any costs will be clarified before project commencement. Collinson Wealth Partner-sourced rates can be higher than standard retail rates, enabling the offsetting of fees.

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Collinson Wealth Partners is a Financial Advice Provider (FSP743091)
A Public Disclosure Statement for Collinson Wealth Partners can be found on its website (noted above).

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