

FOR WEALTH PARTNERS & DISTRIBUTORS

Your expertise. Your brand.

One Partner Desk.

Research SIFs, prepare client conversations and share reports in your own name. A connected workspace for your wealth practice.

ONE WORKSPACE. A MORE CONNECTED PRACTICE.**01 Research & compare**

- Fund screening & live performance
- Unified comparison, rolling returns & risk
- SIF vs mutual funds & a private watchlist

02 Portfolio intelligence

- Portfolio holdings & exposures
- Changes across reporting periods
- Research reports in your branding

03 Tools for better conversations

- Investment & planning calculators
- Redemption calendar with clear assumptions
- Client explainers & presentation materials

04 Reports that carry your name

- Your firm, logo, ARN & contact details
- Research PDFs with heading colors & fonts
- Source dates & assumptions kept visible

05 Client context, close at hand

- Prospects & client records
- Client details alongside your research
- Research and material in the same workspace

06 A presence for your practice

- Your partner page & client link
- Saved firm identity & branding
- A connected account for your daily work

YOUR NAME ON THE REPORT. YOUR EXPERTISE IN THE CONVERSATION.

Add your firm, logo, ARN and contact details. Choose heading colors and fonts for research PDFs, with source dates and assumptions kept visible.

See what your Partner Desk can do.

Explore the workflow with our team, or create your partner account.

[Get a walkthrough](#)[Create your partner account →](#)

Research and illustrations support your professional judgement. They do not replace suitability checks or current scheme documents. Feature access depends on your account and enabled services.