

# Introducing the Vanguard Offer Team

A partnership that delivers the support  
you need to help your clients reach their  
investment goals.



# Vanguard Offer Team

The Vanguard Offer Team delivers a new, deeper range of specialist services to help you manage your business, support your investment proposition, position you for long-term success and deliver better client outcomes.

The team leverages Vanguard's significant resources and global expertise to help you navigate some of the most technical and time-consuming areas you face in your workday.



## Portfolio analytics

Our portfolio analytics specialist assists with:

- Portfolio modeling and construction
- Reviewing asset allocation and fund selection decisions
- Scenario testing
- Analysing factor and ESG (environment, social and governance) strategies
- Deepening your attribution and insight capability
- Investment committee discussions and decision-making

Vanguard's portfolio analytics specialist uses market leading investment tools and software to provide evidence-based portfolio analysis. They contribute to robust investment committee discussions, support the construction of client portfolios and ensure you have a robust approach to portfolio construction.

Vanguard's practice development specialist will help you build a stronger, more efficient business through business strategy, best practice initiatives, benchmarking and industry insights.

### **Practice development**

Our practice development specialist assists with three critical areas of your practice:

#### **Client offer and interactions**

- Helping you articulate your investment philosophy, client value proposition and quantify the value of your advice
- Shaping your upfront and ongoing fees
- Developing client segmentation and service models
- Improving your client engagement and education

#### **Commercial context and business growth**

- Gaining client referrals
- Developing business and marketing plans
- Providing industry benchmarks to provide context for your business decisions
- Adding insights when considering acquisitions and joint ventures
- Supporting self-licenced practices

#### **Operations and people**

- Consulting on your advice process to improve efficiencies
- Recommending systems and software to support your clients and business processes
- Portfolio and client transitions
- Providing insights on service delivery, annual agreements and compliance management
- Benchmarking staff remuneration
- Developing strategies to increase staff engagement and retention
- Creating a robust succession plan

### **Research and investment strategy**

Vanguard's research and investment strategist is adept at providing multi-media content to inform and educate you, your peers and your clients regarding:

- Asset allocation research and fund updates
- Investment research
- Portfolio construction
- Market outlook
- Client concepts include:
  - The value of advice and your investment philosophy
  - Investing
  - Markets and the economy
  - Trends and insights

Our research and investment strategist delivers the latest thinking from the Vanguard Investment Strategy Group who are recognised throughout the world for their thought leadership, research and insights on macro events, economic forecasts and portfolio construction. Our strategist will present at your meetings and webinars, host round tables on your behalf, and actively contribute at your investment committee meetings.

The Offer Team  
specialists work with  
advice firms who  
partner closely with  
Vanguard. Contact  
your Vanguard Sales  
Executive to find out  
more.

Vanguard Investments Australia Ltd (ABN 72 072 881 086 / AFS Licence 227263) is the product issuer. We have not taken yours or your clients' circumstances into account when preparing the information so it may not be applicable to the particular situation you are considering. You should consider yours and your clients' circumstances, and our Product Disclosure Statements ("PDSs"), before making any investment decision or recommendation. You can access our PDSs at [vanguard.com.au](http://vanguard.com.au) or by calling 1300 655 205. Past performance is not an indication of future performance. This publication was prepared in good faith and we accept no liability for any errors or omissions. © 2021 Vanguard Investments Australia Ltd. All rights reserved. ADVVAOT 032021

**Vanguard**<sup>®</sup>

[vanguard.com.au](http://vanguard.com.au)  
1300 655 205