



GLACIER INVEST SUMMIT 2020

THINK WORLD CLASS

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HAVEN'T SAVED
ENOUGH MONEY
PEOPLE ARE LIVING
LONGER NOW



GETTING PRACTICAL

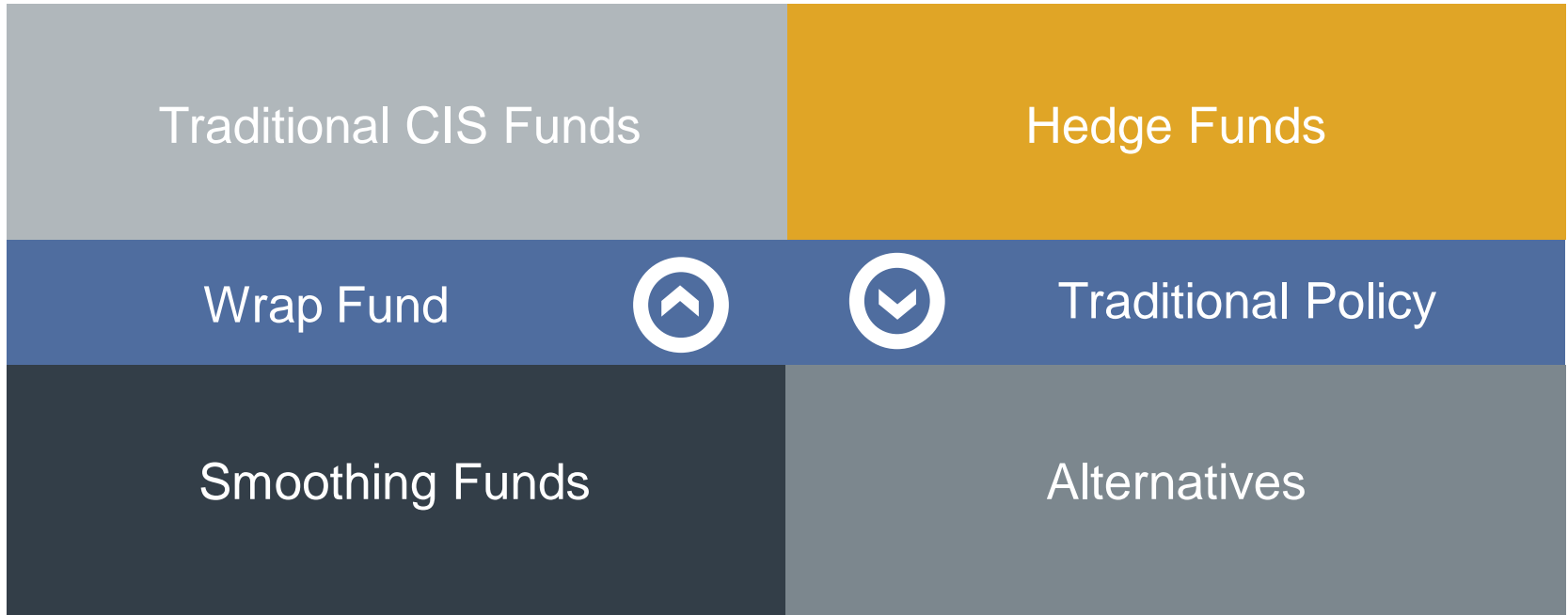
DARREN BURNS

HEAD: INVESTMENT SOLUTIONS GLACIER INVEST

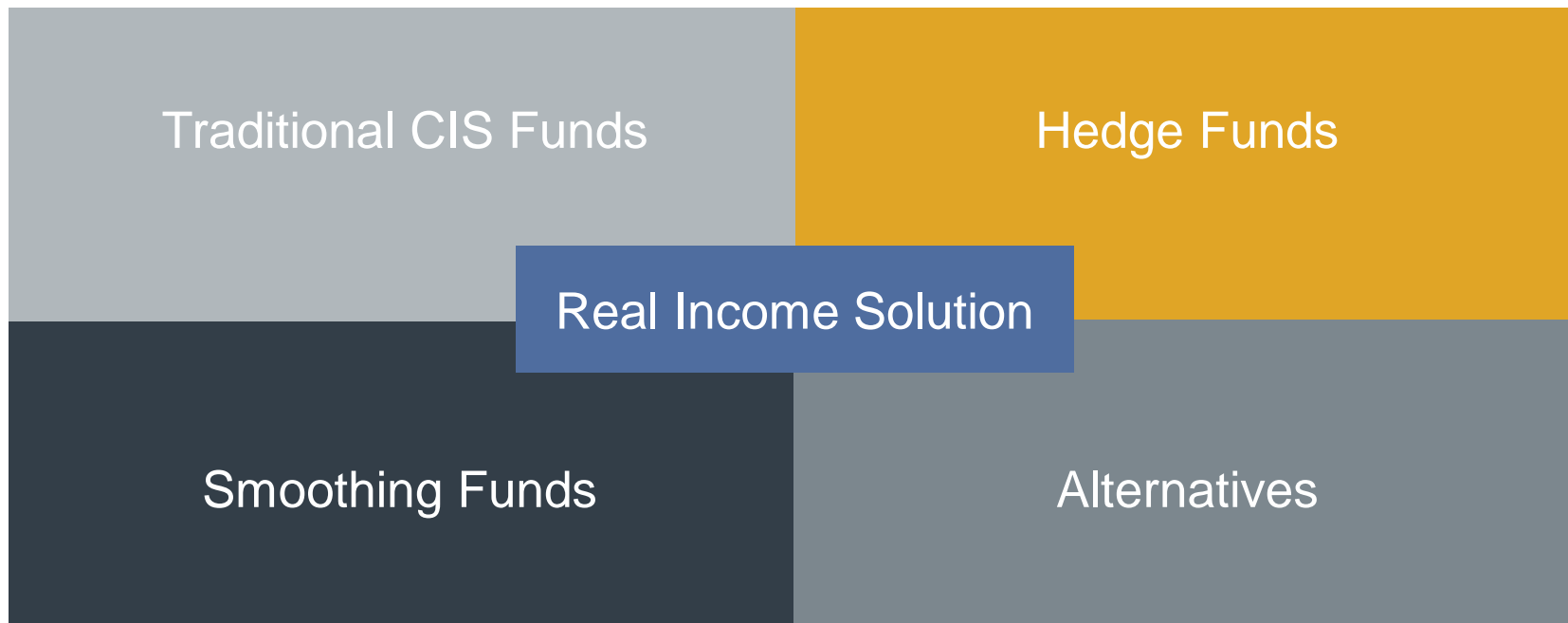
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STRUCTURE



STRUCTURE



ACCESSIBILITY

Off the shelf solutions

Customisable naming conventions

Subject to certain requirements

Limited to living annuities



Cp
Capital Protect

Sr
Sequence Risk

Dc
Decumulation

Hf
Hedge Fund

Ar
Average return

Lg
Longevity

Lg
Longevity

Sr
Seq Returns

Pc
Portfolio Construction

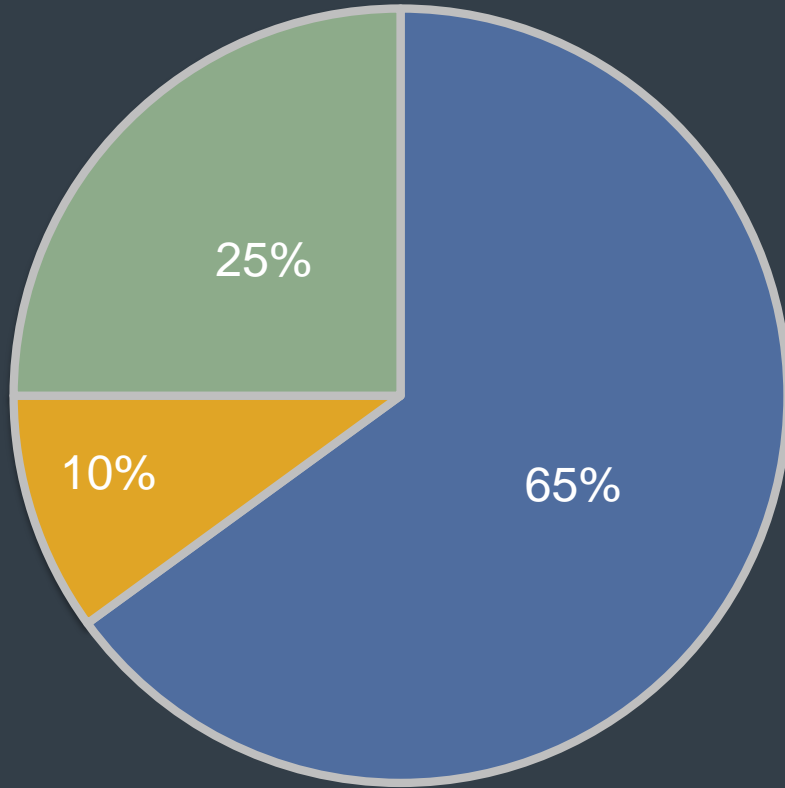
Pc
Portfolio Con

Ac
Accumulation

Sr
Seq Risk

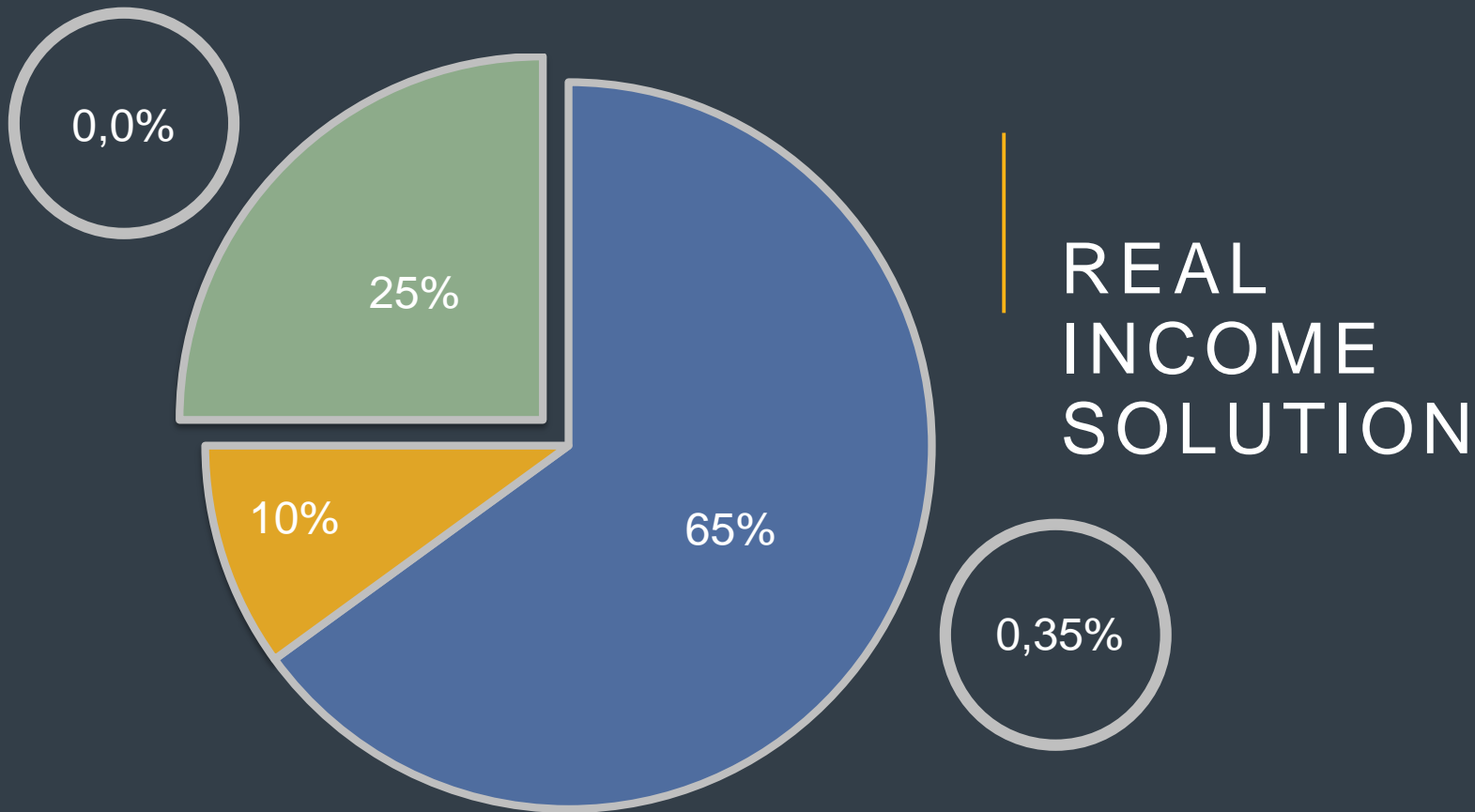
Th
Time Horizon

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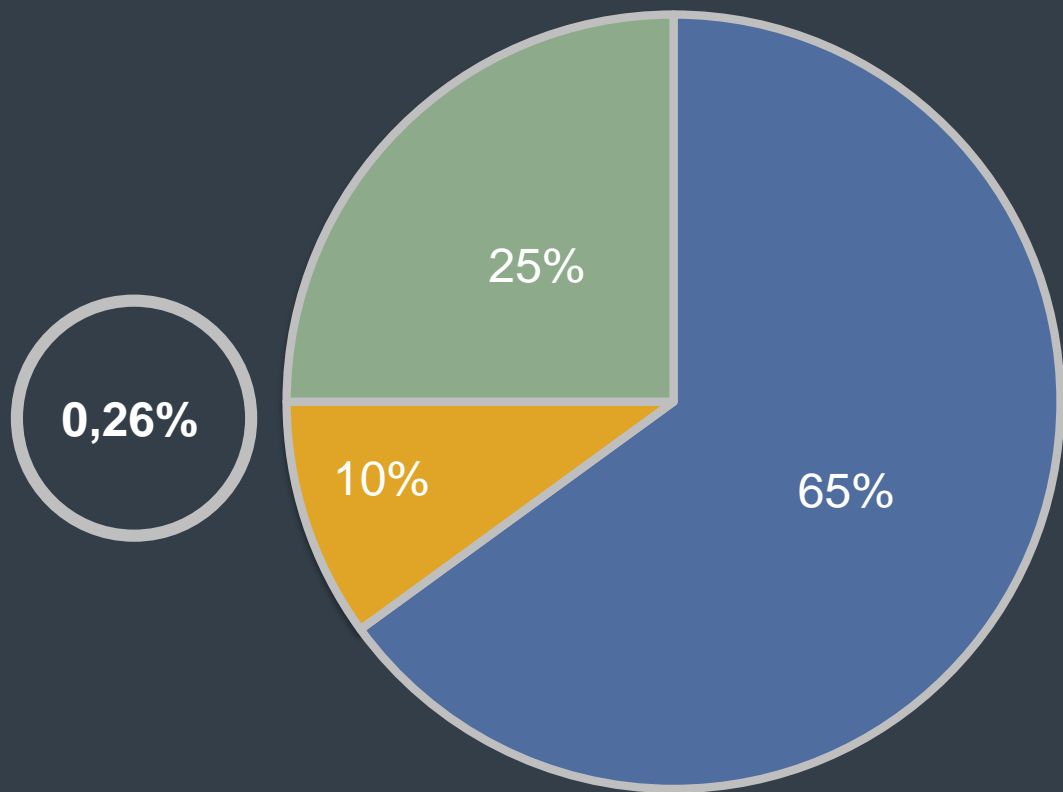


REAL
INCOME
SOLUTION

■ Traditional CIS ■ Hedge Funds ■ Smoothing Fund



Traditional CIS Hedge Funds Smoothing Fund



REAL INCOME SOLUTION

■ Traditional CIS ■ Hedge Funds ■ Smoothing Fund

GLACIER INVEST

Process is standard – as per normal onboarding process

Investment guidelines have been set up and operationally we are ready

PROCESS

1

Adviser signals income solution required

2

Proposal will be given to adviser from BDM and PM

3

Disclosures now included in client mandate and application forms

Sr
Sequence Risk

Ar
Average return

Sr
Seq Returns

Pc
Portfolio Construction

Lg
Longevity Risk

Ir
Interest Rate

Ac

Th

Ar

Ir

WHERE
INVESTMENT
SKILL,
OPERATIONAL
SCALE &
TECHNOLOGY
MEET TO BRING
YOU THE

FUTURE OF PORTFOLIO CONSTRUCTION

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