



Atlas  
Wealth Management



A whole world of  
**experience**

[atlaswealth.com.au](http://atlaswealth.com.au)



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Wealth Management

# Global horizons

**Atlas Wealth Management is a specialist in providing financial services to Australian expatriates.**

Whether you are based in Asia, the Middle East or further afield, we have the experience in providing financial services to the expatriate community.

Atlas Wealth Management was born out of the demand from expatriates who wanted a wealth manager they could trust back in Australia to look after their investments whilst they went overseas to further their careers and life experiences.

We understand that your requirements are more sophisticated than that of an average investor which is why we focus on providing a specialised service. There are a lot of peripheral issues that need to be dealt with when you live overseas and that is the reason why you need to deal with someone who not only understands your situation but has the experience in providing advice to investors who are in the same situation.

# Tailored solutions

Australian shares // International shares // Portfolio Management // Model Portfolios // Superannuation // Fixed Income // Financial Planning // Margin Lending // Accounting

Atlas Wealth Management understands that when it comes to managing your wealth, one size does not fit all. In order to provide you with the best service, it is imperative that you have access to all asset classes and product types so that a tailored solution can be designed. We are able to offer advice, dealing and access to the following products and services:

## Products and services available

Australian shares  
International shares  
Portfolio Management  
Model Portfolios  
Margin Lending  
Fixed Income

These services are provided  
by industry associates  
Superannuation  
Financial Planning  
Accounting

## Australian Shares

At Atlas Wealth Management we provide our clients with the ability to trade in all listed Australian companies. With the Australian economy now ranking as the 14th largest in the world (based on GDP) and the 4th largest in the Asia Pacific region, international investors see the Australian equity market as a viable alternative due to the world class companies that are listed on the index.

The Australian Stock Exchange is the 8th largest in the world (based on the free-float market capitalisation), with a market capitalisation of A\$1.3 trillion and average daily secondary trading of over A\$5 billion.

## International Shares

Atlas Wealth Management is able to offer clients access to over 80 international markets and enables you to trade stocks, options, bonds and foreign exchange.

Some of these markets include:

- New York Stock Exchange
- London Stock Exchange
- Hong Kong Stock Exchange
- Tokyo Stock Exchange
- Singapore Stock Exchange

## Portfolio Management

As a portfolio manager for expatriates, Atlas Wealth Management understands the importance of ensuring that the savings that you have built up in your investment and superannuation accounts not only needs to be preserved but grown as well.

To achieve the aim of preserving and growing your wealth, we gather our research from a number of Australia's and the world's leading stockbroking and research companies. The reason we do this is to ensure that the advice we are basing our investment decisions on is not biased by one company's relationship to an analyst or a company's relationship with an investment bank. By filtering the research we are able to get a concise view of what the markets opinions are and then decipher what the most pertinent research is.

We do not believe in simply placing your investments in a generic managed fund because this will not achieve the level of personalisation or potential that each client deserves. When you sit down with an Atlas Wealth Management adviser, not only will they learn about your personal circumstances but they will tailor a portfolio that is suitable for you. All depending on what your goals are there are a number of different investments which may be incorporated into your portfolio, including equities, derivatives and fixed interest securities.

# Future focused

## The Atlas Private Portfolio Account

The Atlas Wealth Management Private Portfolio Account is our premium service which offers clients the ability to select a style of portfolio that suits your individual circumstances. This could be a balanced, income or growth style portfolio or a mixture of these portfolios. The account is managed on your behalf by a portfolio manager with strict compliance to the style chosen being maintained.

The benefit of this account is that even though you are based overseas, you have the peace of mind knowing that your investments are being monitored and managed on a daily basis. This enables you to focus on the other aspects of your life, such as family, career and lifestyle.

With the Private Portfolio Account you always maintain:

**Transparency** – at any time of the day or week you are able to login and view your portfolio.

**Ownership** – you retain all the benefits of owning direct shares. These include portability, dividends and tax credits.

**Individuality** – one of the reasons this account is superior to a managed fund is that when you invest your funds, the cost basis that is created is your own unlike in a managed fund where you inherit the pooled cost basis, potentially exposing you to a number of negative tax events.

### Superannuation

Whilst superannuation can be a very effective form of saving for Australians, the considerations that an expatriate needs to take are very different from that of an average superannuation investor in Australia. This is one of the main reasons why you need to deal with a specialist when it comes to managing your superannuation when you are offshore.

The Australian superannuation system provides a very effective form of retirement planning and, used correctly, can ensure that when it comes time to retire you have a portfolio that provides for you and your family well into your later years. It is important to have the peace of mind knowing that what you are achieving now will assist you in obtaining a self sufficient retirement in the future.

### Financial Planning

From time to time it is important to take stock of what you have and where you want to go. This is where a financial plan can come into play. Atlas Wealth Management works with specialists who provide financial plans to expatriates

There are a number of events that provide a good opportunity to arrange for a financial plan to be conducted. These can include:

Change of financial circumstances.  
Examples of this can include:

- A change in career or position in the work force
- Sale of a business or other investments
- An inheritance

Change of personal circumstances  
Examples of this can include:

- Moving from Australia to work overseas
- Leaving a job overseas to return to work or retire in Australia
- Marriage or divorce

### Accounting

When deciding to move overseas, there are a multitude of decisions to make when it comes to your tax status. Do you qualify or elect to be a non-resident for tax purposes or would you still be classified as a resident even though you are working overseas?

Often when expatriates relocate overseas their tax status is the last thing on their mind and this is one of the reasons you cannot afford to obtain advice that is not appropriate or incorrect. Atlas Wealth Management works with some of the best expatriate tax accountants in the country to ensure that not only is the information that you receive appropriate but also up to date.

## Frequently Asked Questions

### **How do I become a client?**

There are a number of ways you can become a client of Atlas Wealth Management. You can either:

- Contact our office to find out when an adviser will be available to meet in person; or
- A meeting to be conducted over the phone; or
- We can arrange to meet when you're next in Australia. You are welcome to visit our office or we are more than happy to come to you.

In order to correctly understand your financial position and the requirements

you have, we recommend sitting down for a complimentary meeting to discuss your personal circumstances.

### **How secure are my investments?**

Atlas Wealth Management only works with Australia's leading financial services companies. These companies pride themselves on maintaining their integrity and are subject to some of the world's toughest financial regulations.

By investing in Australian securities you will always have the peace of mind knowing you're account is being operated under the jurisdiction of the Australian Securities Investment Commission (ASIC).

### **What happens when I repatriate back to Australia?**

We have many clients who come back to Australia to either continue working or to retire. They still utilise the services of Atlas Wealth Management because they still require someone to manage their wealth. As we have managed your investments over a number of years, we are usually in the best position to provide ongoing advice because no one understands your position better than we do.



# Atlas

Wealth Management

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