

SMSFs eye BT Panorama

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KEY FACTS

- BT Panorama is now used by 1600 self-managed super funds (SMSFs) and has 2200 registered advisers
- BT Panorama offers intuitive, customer centred design and is the first of its kind to simplify and enhance the investment experience for advisers and clients
- BT Panorama carries end to end services for SMSFs to manage their investments and a full fund administration capability
- BT Panorama's tailored portfolio capability and supporting tools will launch later this year
- According to Investment Trends' 2015 Planner Technology Report, BT Panorama is the number one choice among advisers looking to switch platforms*
- More than 950 advisers attended BT's adviser roadshow BTNext 2016 between 17-26 May

BT Panorama is now being used by 1600 SMSFs according to BT Head of SMSF, Mr Craig Lawrenson.

Speaking at BT's annual adviser roadshow, BTNext 2016, Mr Lawrenson said "While BT Panorama has quickly gained pace with advisers, we're also seeing strong engagement from SMSFs and now have 1600 Australian SMSFs using the platform."

BT Panorama is an intuitive operating system, the first of its kind, and is transforming the management of investment portfolios and self-managed super funds.

It now includes a complete SMSF offering for advisers, accountants and clients with its administration capability offering now fully rounded out.

"We know SMSFs have additional layers of responsibility because they are self-managed, so simple solutions with ease and functionality are top of mind," Mr Lawrenson said.

The recent launch of BT Invest and Self-Managed Super Funds on BT Panorama complements the existing cash, term deposits and managed fund offerings.

"Additionally BT Panorama's integration with Westpac Live means our customers can now manage their wealth and banking side by side.

Mr Lawrenson was joined by Jo Moxey, BT Head of Adviser Distribution who discussed the latest developments around BT's Panorama Investment and SMSF solution, including how to drive efficiencies with adviser's businesses and their clients.

Media contact

Nicole Webb
0466 479 673
nicole.webb@btfinancialgroup.com

@BTFGnews

BT General Manager, Platforms and Investments, John Shuttleworth said these latest developments build on BT Panorama's success due to its advanced technology and customer-led design.

"BT Panorama is meeting the needs of the evolving client-adviser relationship - where clients are demanding more control and advisers need smart tools that demonstrate value and save time.

"The future looks bright and there is more to come with BT Panorama this year. It's full steam ahead and we're working to deliver tailored model portfolios and additional portfolio construction capability in the coming months. We will also have available a complete superannuation offering by the end of the year," Mr Shuttleworth said.

According to a recent report from Investment Trends* advisers are seeking platforms that offer better support for their business. BT Panorama is the most sought after in the industry among those looking to make a platform switch.

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Ends

*Investment Trends, 2015 Planner Technology Report, based on a survey of 892 financial planners.

Media contact

Nicole Webb
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@BTFGnews