



## **Media Release**

**Sydney 11<sup>th</sup> April 2019**

### **Clime Investment Management expands retail offer - adds 4 portfolios to the OpenInvest Marketplace**

**11<sup>th</sup> April 2019.** Wealth management solutions provider Clime Investment Management will tap into the retail market with its decision to offer four investment portfolios via OpenInvest, a new online marketplace and platform directly offering investors a diverse range of investment managers.

Clime will be the 7th manager to join the OpenInvest platform, providing retail investors an opportunity to invest in its Defensive Income, Sustainable Income, Robust Growth or Maximum Growth portfolios in an offering that provides them with a wide range of investment options.

Clime CEO Rod Bristow says: "It's an exciting development to be joining the growing list of managers on the OpenInvest platform"

"To date, our primary focus has been in the wholesale and sophisticated investor market spaces, and our presence on the OpenInvest platform gives us an opportunity to extend our service offering to the retail market, responding to investor demand for quality investment solutions provided by market specialists.

"The added advantage of the platform is the transparency it provides investors, who will now have the opportunity to browse the site and research the investment styles across different managers, allowing for a genuine 'apples and apples' comparison."

The Clime offering spans key offers from a Defensive Income portfolio, targeted for investors averse to large fluctuations in their investments over shorter time periods, the Sustainable Growth (wanting consistent and sustainable income), Robust Growth (an emphasis on growth and less focus on short-term stability) completing with Maximum Growth (a focus on long-term returns while accepting the risk accompanying this investment style).

Bristow says: "It's becoming quite evident that self-directed investors, and especially self-managed super fund (SMSF) trustees, want ease of access to professional investment managers, and that is what the OpenInvest platform offers".

“Australia’s investment managers have the expertise, knowledge and experience to assist self-directed investors, and the key to this platform is allowing investors to take the time to get to know the investment managers, their processes and how they are investing.”

Co-founder and CEO of OpenInvest, Andrew Varlamos, says: “In a post Royal Commission environment, providing online access to professional investment managers is a logical solution for self-directed investors wanting quality investment information. For many of these people, either the cost of personal advice is beyond their means or they simply don’t want to engage an adviser.”

### **About Clime Investment Management Limited (ASX: CIW)**



Clime is a diversified financial services business with operations encompassing private wealth advice, investment solutions for retail and wholesale clients, investor education and SMSF Administration.

Private Wealth Advice helps high net worth and sophisticated investor clients achieve their goals through tailored financial advice provided by our expert national advisory team.

Clime’s Investment Solutions are targeted toward helping clients achieve security in retirement. Clime manages investments across a range of asset classes designed to grow and protect wealth for clients while accumulating wealth and to generate meaningful income in retirement. Solutions include Individually Managed Accounts (IMAs), Separately Managed Accounts (SMAs), Managed Funds and two Listed Investment Companies, Clime Capital (ASX: CAM) and CBG Capital (ASX: CBC).

Each year Clime holds more than 30 seminars and events around the country to share our views and market insights, with the goal of inspiring attendees to take positive action to improve their wealth. Clime also provides direct share research and the perspective of our internal equity analyst team direct to consumer and financial adviser subscribers via its online share market subscription service [www.climedirect.com.au](http://www.climedirect.com.au)

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