



investfit

Predictive Analytics for Financial Advice

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Our Purpose



advice we can be confident will place
vulnerable people in a better position

Port Authority Workers



Vs



Technology lead to better outcomes for workers



“...Without the assistance and research from Investfit, I do not believe we would have been successful in providing the (NT Port Authority) employees with the evidence required to negotiate the financial security that they received...”

- Mary Favelle Financial Adviser **Mortgage Choice Financial Planning**

The current problem



Poor advice is hurting the consumer

Advisors believe they are doing the right thing!

Why do we have this
problem?



outdated legacy technology

Leaves consumers vulnerable

“People are 15 times more likely to suffer a major depressive disorder following material, unexpected financial loss”

Department of Psychiatry, Oregon Health Sciences University

The solution

“Vulnerability is the birthplace of innovation,
creativity and change”

Dr Brene Brown

Technology enables confident advice



Case Study



Perth planner Jason Atkins

Case study: advice scenario



Advice: SMSF to leverage into property

Client Age: 40

Salary: \$125,000

Super Fund: \$125,000

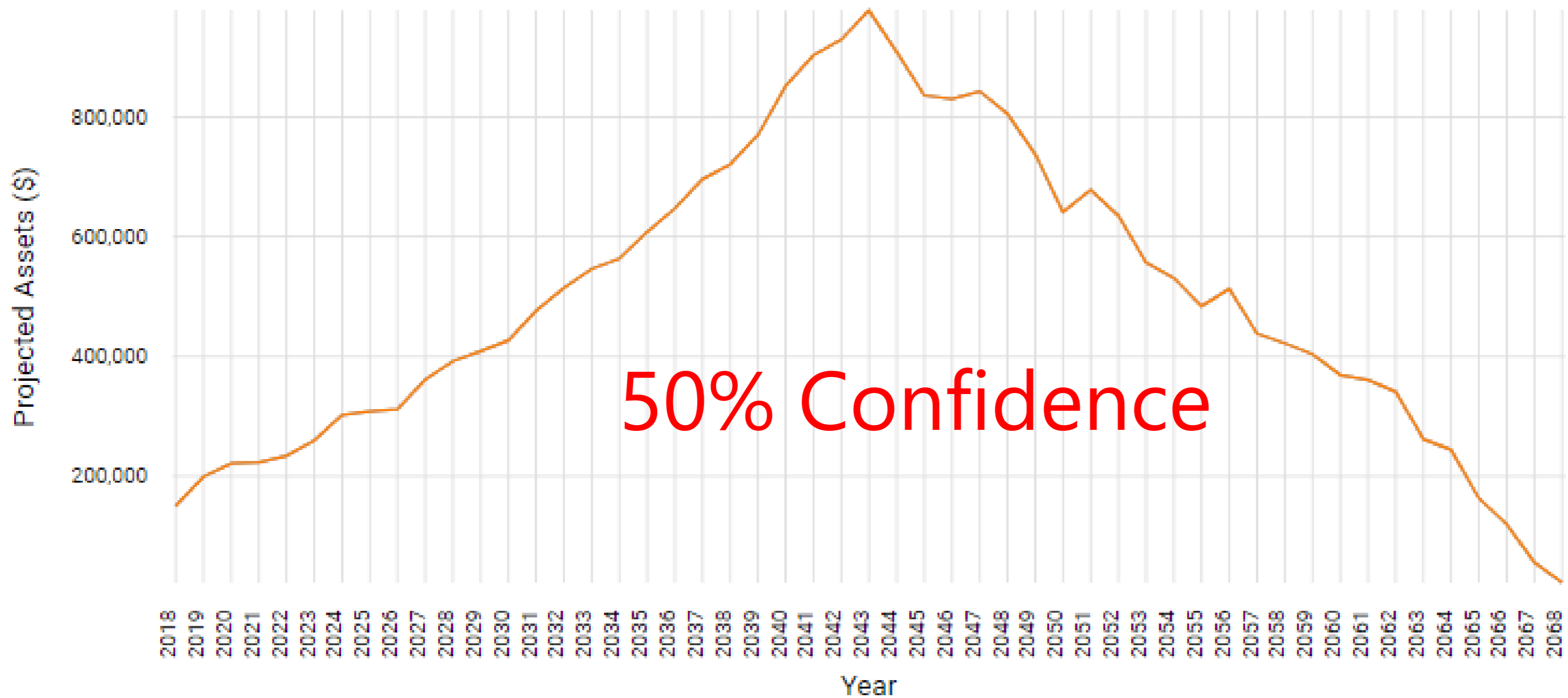


Property \$625,000

Spreadsheet Approach

Tracking Projected Assets

This chart shows the balance of investments by year for the current investment strategy and that from a previous strategy to show how you are tracking to achieve your retirement goals

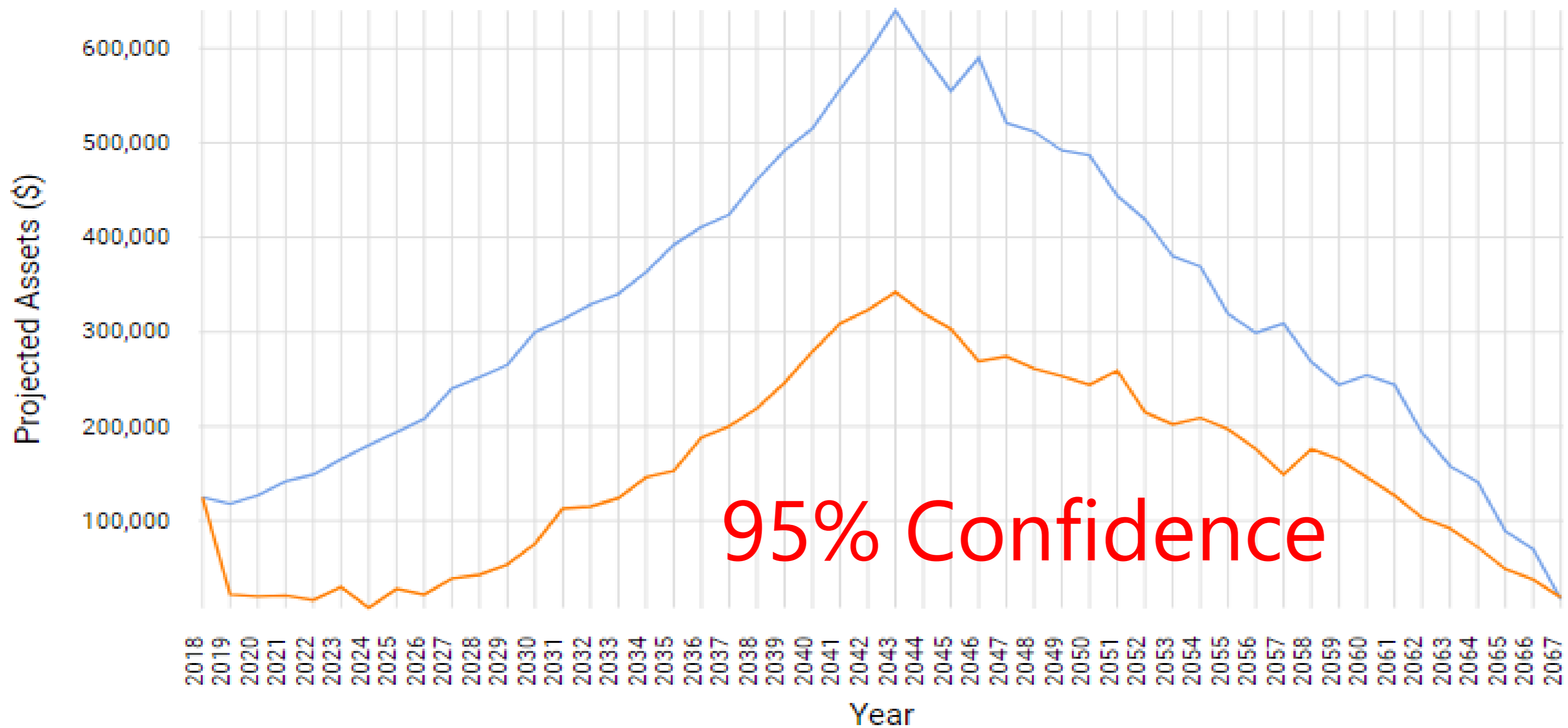


**With Property
\$79,000**

Stochastic Approach

Tracking Projected Assets

This chart shows the balance of investments by year for the current investment strategy and that from a previous strategy to show how you are tracking to achieve your retirement goals



**With Property
\$46,000**

**Leave as is
\$63,000**

ASIC Summary

- No reasonable investigation
- Could not be confident that the client would be left in a better position
- Client was not fully informed of the risks

Gift

Technology & Compliance eBook

URL: <https://investfit.io/comptech/>

Participant code: FOFS2018

Q&A



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