



Offering you
and your clients
the true one
view of all your
assets and
liabilities

About OneVue

Australia's first adviser directed UMA

OneVue is the only genuine Unified Managed Account (UMA) in the market. The name OneVue is synonymous with the unique single view of portfolios that the UMA provides clients, advisers and their dealer groups across all investments. The double entry Oracle based accounting system, which drives the UMA, can easily accommodate all categories of assets and liabilities including complex instruments such as warrants, stapled securities, margin lending, term deposits and property.

OneVue does not compete with its clients

The OneVue strategy is clear. OneVue are not fund managers or financial advisers. Our single focus is to work with you to build and deliver the tailored solutions needed to best service your clients, so you can take control of your respective markets and grow your businesses. OneVue does not dictate product features such as investment menus or mandates. The OneVue open architecture means that we can incorporate your unique IP into the UMA.

OneVue owns and controls all its underlying technologies

In addition to rich functionality another key differentiator is that OneVue also owns all the underlying core systems that deliver the UMA and the SMA. This means we can work with you to provide flexibility around pricing, product development and client deliverables. Our current clients greatly appreciate this point of difference because it makes us fully accountable for delivery of your promised outcomes.

With tax reporting engine

The UMA has a market leading tax reporting engine which has been especially well received by the SMSF market. OneVue is committed to maintaining its market edge. OneVue offers you some of the most robust and proven capabilities to match the requirements of your individual practices.

An independent and non-institutionally aligned company

OneVue is a privately owned organisation with a small number of committed shareholders who subscribe to our vision and strategy. Being non aligned is an advantage. OneVue has no competing agendas and can concentrate on adviser requirements.

We work in partnership with our clients, make decisions and execute with a minimum of bureaucracy. We are well positioned to tackle the challenges associated with running a business and building a franchise in the market. Our clients appreciate being able to speak directly to Connie Mckeage, OneVue's Group CEO, or other OneVue senior management, whenever they need to do so.

AsiaPac presence

OneVue has over 100 employees and 5 offices across the AsiaPac region. OneVue also own 50% of WealthCraft Systems Hong Kong which in turn owns 100% of a Shenzhen based software development centre. In conjunction with WealthCraft, OneVue has created AsiaPac's first fully automated, end-to-end pension administration system (PAS) giving the company a diversified revenue stream with clients in various geographical locations.

For more information about OneVue

- Call OneVue on 1300 790 235
- Visit our website at www.onevue.com.au