

Introducing BT Panorama

Expert support for your advice experience



BT Panorama
T E N Y E A R S

For your financial adviser to be at their most effective in carrying out your financial plan, they need access to a wide range of investment options and state-of-the-art systems and technology.

BT Panorama is a wealth platform built to support your adviser to deliver the highest quality advice experience.

What is a wealth platform?

Wealth platforms give investors an easy way to access and manage a wide range of investments. Originally developed to connect investors with managed funds, modern wealth platforms now offer a wide variety of investments – from direct shares to managed accounts.

With advancements in digital technology, wealth platform tools have also become more comprehensive and accessible. They provide a simple way to manage, monitor and report assets across your portfolio including SMSF, investment, super and pension accounts.

For you and your financial adviser, a wealth platform delivers a single, convenient solution for carrying out your financial plan and keeping you up-to-date on your entire financial investment portfolio and wealth position.

A wealth platform backed by industry experts and tested, smart technology

When you choose BT Panorama, you tap into the experience that matters. We make the advice journey easier with a wealth platform that delivers intuitive technology, a wide range of features and exceptional support.

Drawing on best-practice in user-friendly design, we've created a digital experience that makes tasks and information simple and accessible.



Award-winning

Australian Wealth Management Awards 2024
Best Platform, Investment Trends Best Client Portal
in 2023, for six years running.¹



Making investing easier with digital tools

Save time and get easy access to information on your investments with digital tools available through the award-winning BT Panorama mobile app and client portal.

- Easy access to real-time investment snapshots and reports.
- Give instant approval for transactions, new accounts, trades, orders and more using our secure, user-friendly digital workflows.
- Access to select platform functionality and tasks on the go with the BT Panorama mobile app.

1. Investment Trends Competitive Analysis & Benchmarking Report, 2023.

One portal for your wealth needs

BT Panorama delivers a complete picture of your financial wealth and assets across your whole portfolio, including investments, SMSF, pensions, trusts and more. You'll also have access to a comprehensive range of products to help you and your financial adviser grow and protect your wealth.

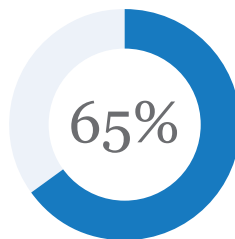
- Investment options across a broad range of asset classes and products including cash, direct shares, ETFs and more.
- Choose from 290+ managed portfolios, 600+ managed funds and ASX-listed securities¹.
- Access to a range of insurance options from market leaders.



Technology you can trust

As an established leader in technology and financial services, protecting your data is our key priority. Together with comprehensive training for our team members, we use the expertise of our internal cybersecurity team and external auditors to protect clients' accounts from risk of fraud, cybercrime and financial crime.

- We use robust security in technology, encryption and authentication methods – including SMS two-factor security.
- Our protection measures apply multiple layers of security, including intrusion prevention systems and web application firewalls.
- We have a dedicated cyber security team to continually monitor and test our security defenses and we conduct ethical hacks to test systems.



of financial advice practices in Australia use BT Panorama.

Backed by experience and scale

BT have been supporting financial advisers for more than 50 years. We launched BT Panorama in 2014 and since then we've built a platform that is a leader in the financial advice market. As one of the largest and most experienced platform providers we have the scale and commitment to develop state-of-the-art technology for financial advisers and their clients.

Discover BT Panorama

Speak to your financial adviser to find out more.



¹. Not all investment options offered on BT Panorama will be available to all investors.

Disclaimer

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