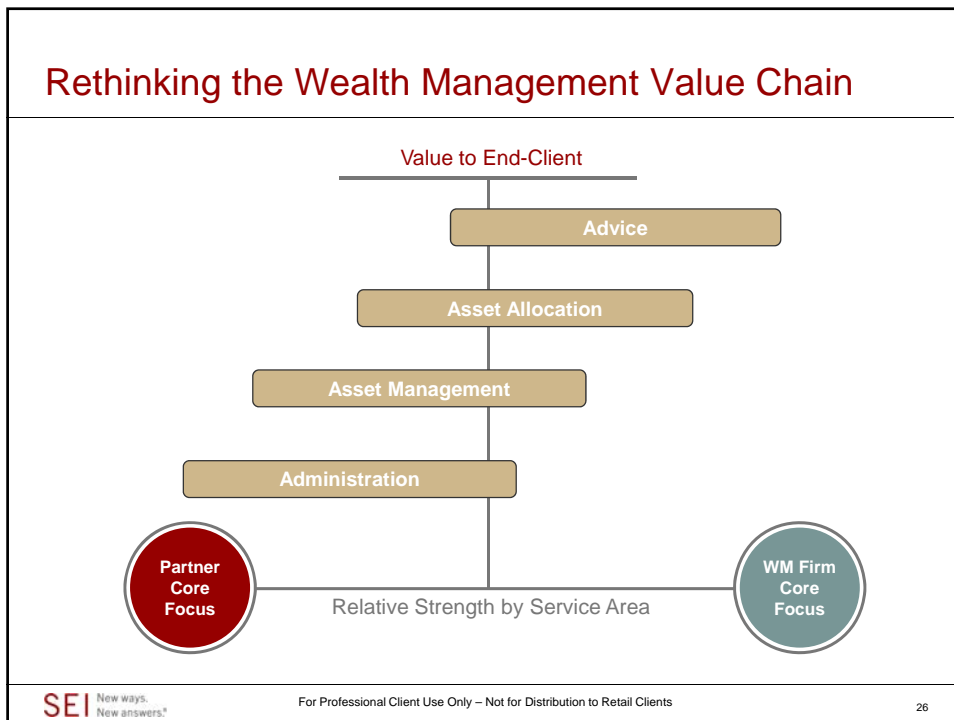
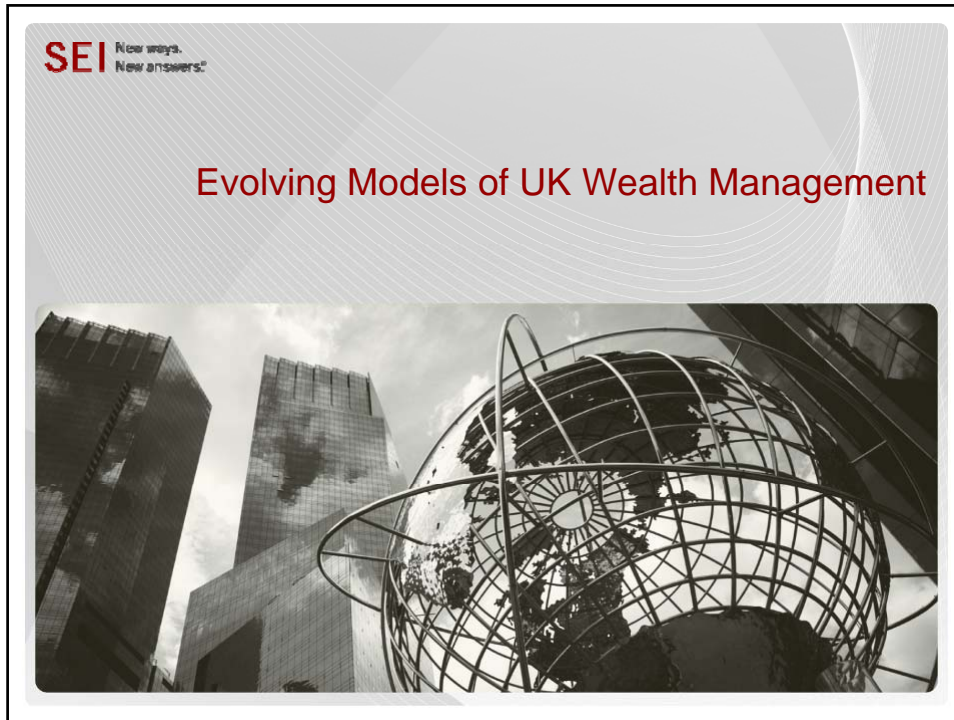


# Distributor Funds – Defining the Principles for Good Consumer Outcomes



## Distributor Funds – Defining the Principles for Good Consumer Outcomes

### Critical Considerations

1. Is your offering consistent or bespoke?
2. Which functions do you insource or outsource?



### Different Models Across Channels

	Firm A	Firm B	Firm C
Advice	Investment	Investment	Holistic Planning
Asset Allocation	Models	Bespoke	Models
Asset Management	Outsource	Insource	Insource
Administration	Outsource	Insource	Outsource
Growth Strategy	Organic	Organic Acquisitions	Organic Acquisitions

## Distributor Funds – Defining the Principles for Good Consumer Outcomes

### How Does Shape Impact Your Growth Strategy?

- 1. Does your shape aid or inhibit your ability to grow?**
  - How flexible is your shape?
  - Where are your resources concentrated - asset gathering or administration?
  
- 2. Do you employ specialists or do people wear more than one hat?**
  - Business development
  - Financial planning
  - Client management
  - Fund management
  - Administration
  
- 3. What is your view on owning vs. sourcing capabilities?**

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