

Præmium Newsletter

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Go to www.praemium.com.au

smsf fever! You may have seen the press earlier this month when we announced that Præmium is now one of the largest SMSF administration platforms in the market, administering over \$11bn for 13,200 SMSFs. We thank you for your support in helping us achieve this milestone and we hope to continue to deliver more value to you in the future.

Last month we also held our first online training session (webinar). Following the positive feedback from those who attended, we have decided to provide a regular series of these online training sessions. There is no charge for you to attend the webinar, you simply need to register in advance and have access to the Internet and a telephone. We will notify you of all scheduled webinars via this newsletter. Please also let the Client Services team know if there are any particular topics that you would like covered during these sessions!

Thank you also to Patrick Canion, from rmg financial services, who has shared some of his experiences with V-Wrap and p-Desktop (see the Client Profile below).

new enhancement! list of all broker & bank links

Helping you to manage your broker and bank links, a new enhancement was released in February which provides one list of all of your broker and bank links. This report will save you needing to go into each portfolio to review which brokers and bank links you have set up for your clients.

To review this report:

- go to **Maintenance**
- select **Data Download**
- select the new menu item **Portfolio Broker and Bank Links**.

p-desktop webinar: 10am thursday 20 march

Our next webinar will provide an overview of our new market data system, p-Desktop. Join Scott Jackson at 10am on Thursday 20th March as he shows you:

- an overview of the p-Desktop functionality
- how you can review your client's live portfolios, including up to date valuations and live capital gains analysis
- how you can set up watch lists and charts
- how you can provide access to p-Desktop to your clients.

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tip of the month don't forget to read your system messages

In response to your feedback, we removed the flashing system messages button from V-Wrap. However it now seems that many of you are forgetting to look at new system messages.

System messages contain important updates about enhancements, corporate actions and other updates. We do try to ensure that only the most important messages are released via the system messages to ensure that they are relevant to you.

So, please don't forget to have a quick look at your system messages every day. You may find the answers to some of your questions.

Some of our clients are now finding p-Desktop to be a useful tool in marketing their services to prospects, as well as enhancing the service they provide to existing clients. You can read below how Patrick Canion from **rmg financial services** is using p-Desktop in his business.

Please note that this webinar will be restricted to the first 50 respondees. We will schedule another webinar on this topic should there be sufficient demand.

To register for the p-Desktop webinar, please [click here](#).

update your contact details

To ensure we can respond to your queries or provide you with important information, please ensure that your contact details are kept up to date within V-Wrap.

There are two places you need to check your contact details:

Service contact details

To check the contact details of your service:

- Go to **System Management**
- Select **Service Maintenance**.

This screen allows you to record the address, phone numbers and email addresses relevant to your service as a whole. In particular, you will notice 3 email fields:

- **Praemium Messages:** This is the email address that Client Services will use to send your Service emails.
- **Client Feedback:** This is the email address that messages will be sent to when queries are submitted from your clients via the Feedback Button within V-Wrap.
- **Invoicing:** This is the email address that invoices will be sent to by Præmium's accounts department.

Administrator contact details

These contact details relate to you as an individual. To check these contact details:

- Go to Maintenance
- Select User Maintenance
- Select Change User Details.

spaa national conference: 12-14 march

For all of you that are members of SPAA and will be at their National Conference in Brisbane this week, we look forward to seeing you there! Præmium is proud to once again be a platinum sponsor of the SPAA National Conference, in addition to hosting the cocktail party on Wednesday night.

The whole Præmium sales team will be at the conference (and the cocktail party!). Please pop by to say hello, or to have a demonstration of p-Desktop if you haven't seen it yet.

[SPAA National Conference](#)

recent announcements

In case you missed the following announcement from Præmium, you can read it by clicking the link below:

- [Ausmaq and Præmium offer integrated fund solution](#) (18 February 2008)
- [Præmium dominates SMSFs with over \\$11bn under administration](#) (12 February 2008)

You can view ASX Announcements at any time by visiting [our website](#).

rmg financial services uses p-Desktop to enhance service offering

client profile



Patrick Canion, General Manager and Partner of rmg financial services in Perth speaks of his experience with V-Wrap and p-Desktop and how they have helped to enhance his service offering.



Tell us a little about your firm

rmg financial services is a boutique practice that advises on more than \$250 million for over 460 families. Based in Perth, we have been around of over 21 years and have recently increased our focus on value-based wealth accumulators. The practice now targets professionals aged between 46 and 60 with incomes of over \$250,000 a year, such as medical practitioners, chief financial officers and owners of small to medium businesses.

rmg has been recognised for its high quality of advice, having been selected by IFA magazine as the Number 1 Financial Advisory Practice in Western Australia for both 2006 and 2007.

What is your role at rmg financial services?

I am the General Manager, and a Partner, of **rmg financial services**. As a Certified Financial Planner and holding a Master of Applied Finance and Investment, I specialise in assisting professionals and business owners in creating wealth.

How long have you been using Præmium?

We have been using Præmium for approximately 12 months.

Why did you decide to start using Præmium?

As we shifted our focus to wealth accumulators and high income earners, we found there was an increasing demand to deal in direct shares. This is not a service we had offered in the past and we knew that although it might be easy to set up a Commsec account to trade in direct shares, it was difficult to administer direct share portfolios in the long term. We also did not believe that wraps or master trusts provided a cost-effective solution for this type of investment.

Præmium provided us with a solution to this problem. We have now been able to increase the range of services we offer, as well as provide a robust administration service to cater for the wealth accumulator market.

How do you use Præmium in your business?

We use V-Wrap to administer our client's direct share portfolios and are seeing real benefits from this, especially as we approach the tax season.

We also incorporate Præmium's p-Desktop in our monthly client meetings. p-Desktop allows us to have the client's live portfolio on the screen and discuss up to date share matrices, dividend information, P/E ratios and so on. We have found this to be so successful that we are looking at using p-Desktop to actively market out new service offerings to prospects.

We certainly expect to use Præmium more and more as its services are so congruent with the future direction of our business.