Fiducian platforms

Let's together design a platform that suits your clients, advice process and practice needs.

Branding

Either brand the platform Fiducian or personalise the platform with customised branding.

Investment range

Select and trade on-line from the largest range of investments in market across funds, domestic and international listed equities, domestic fixed income, ETFs, AREITs, LITs and LICs.

Fee structure

Together we design a fee structure that works for your clients, advisers and practice.

Manage cash accounts

Select cash levels to automatic trigger investment of surplus cash and sell investments when cash is required.

Rebalance & transact

Select to switch or re-balanced individual or bulk client portfolios.

Create a SMA or model portfolio

Select from a wide range of SMAs and model portfolios or simply create them.

Implement your advice

Implement your RoA/SoA advice seemlessly on the platform via straight through processing*.

Choose the best tax outcomes for your clients.

Select from maximum gain and maximum loss LIFO, FIFO or parcel selection.

Choose when a client should transition to retirement

Seamlessly transition between accumulation and retirement accounts and back again when needed for your clients.

* STP available via Fiducian On-line Resource Centre.

How to best manage your practice

Select from a wide range of customisable practice reports to help stay on top of your client and practice compliance needs.

How you view and report on client portfolio

Select from a wide range of client, family group and adviser reports that are both client friendly and easy to use.

How to best manage your clients

Integrate a wide range of tools into your practice to stay on top of important client activities.

Platform Features	Fiducian Platform	Custom Platform	Badge Platform
Your branding			✓
Diverse range of investments	✓	✓	✓
Fee structure design	✓	✓	✓
Manage cash accounts	✓	✓	✓
Rebalancing/transact client portfolios	✓	✓	✓
Customised SMA		✓	
Automatically implement your RoAs/SoAs on platform	✓	✓	✓
Optimise client tax outcome	✓	✓	✓
Transition clients in and out of super and pension accounts	✓	✓	✓
Diverse range of practice management tools	✓	✓	✓
Wide range of client portfolio reports	✓	✓	✓
Diverse range of client management tools	✓	✓	✓
Access the platform, apply and sign on the go	✓	✓	✓

Contact one of our Business Development Managers to find out more information, or book a platform demonstration.

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