

Portfolio Construction Forum – farrelly’s Dynamic Asset Allocation Service

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BFP Member Benefit & Special Pricing Arrangement

Business Name

Portfolio Construction Forum – farrelly’s Dynamic Asset Allocation Service

Website:

<https://portfolioconstructionforum.edu.au/farrellys>

Synopsis of Business

Portfolio Construction Forum is the specialist, independent, investment continuing education, accreditation and certification service for Australian and NZ investment and wealth professionals. We provide a curriculum of live and on-demand content – at the heart of which is our multi-media library – curated for the community of professionals involved in constructing or giving advice on multi-asset, multi-manager portfolios. Akin to a private business school, the Forum enables better quality portfolio construction knowledge, skill and expertise for practitioners, to help them improve the financial wellbeing of individuals.

Product/Service Description

farrelly’s Dynamic Asset Allocation Service

farrelly’s Dynamic Asset Allocation service is a subscription available exclusively through Portfolio Construction Forum.

farrelly’s Dynamic Asset Allocation enables a dynamic, forward-looking approach to asset allocation, a key driver of quality portfolio construction and quality results for investors. farrelly’s is grounded in a logical, client-focused, forward-looking risk and return forecasting framework, based on a robust approach that has stood the test of time. It will help you create robust portfolios compatible with how investors really think and what they really want.

The Dynamic Asset Allocation Service is a multi-faceted publication, updated quarterly in early March, June, September and December. It has five components:

1. DAA Handbook – this features editorial exploring investment strategy “hot topics”, farrelly’s long-term forecasts for asset classes, a detailed review of the long-term forecasts for an individual asset class (rotating across asset classes each quarter) and three asset allocation models to assist with implementation
2. DAA Wizard - simple-to-use Excel-based tool enables subscribers to adapt the farrelly’s model asset allocations to create optimal portfolios for clients’ unique circumstances, automatically recommending how to place new money and what changes should be made to existing portfolios.

3. DAA Implementor - this more advanced Excel-based tool is best suited to subscribers who wish to adapt the farrelly's benchmark asset allocations to individual client circumstances.
4. DAA Presentation – an investor-friendly presentation includes a variety of slides that cover the basics of the farrelly's philosophy.
5. DAA Profiler - a very simple tool that allows subscribers to determine clients' financial risk tolerance and match that to the farrelly's model asset allocations.

BFP Pricing Arrangement

Portfolio Construction Forum and the Boutique Financial Planning Principals Association (BFP) have agreed a preferential subscription arrangement for the farrelly's Investment Strategy service, whereby BFP members receive a 20% concession on the annual subscription fee. This reduces the fee from A\$1,600+GST per annum paid quarterly at A\$400+GST per quarter, to A\$1,250+GST per annum paid quarterly at A\$312.50+GST per quarter.

Process to Access Offer

The farrelly's Dynamic Asset Allocation service is a quarterly subscription, payable by credit card. The subscription has no fixed period - it carries on until you cancel it, with the caveat that you must cancel in writing via email before we send the next quarter's update or the quarterly fee is payable. Each quarter (early March, June, September and December) we will email you to advise that the quarterly update is available, after which we will process your credit card payment and send you an invoice for your records.

To subscribe:

- **click on the following link – an email will open, fill in the form and hit send: BFP farrelly's subscription \$312.50+GST per quarter [Subscribe now](#)**
- Portfolio Construction Forum will then contact you via phone to obtain your credit card details.
- Please note that by using the link to subscribe to farrelly's, you agree you have read, understood and agree to be bound by the [farrelly's Investment Strategy Service terms and conditions](#).

Business Representative Details

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