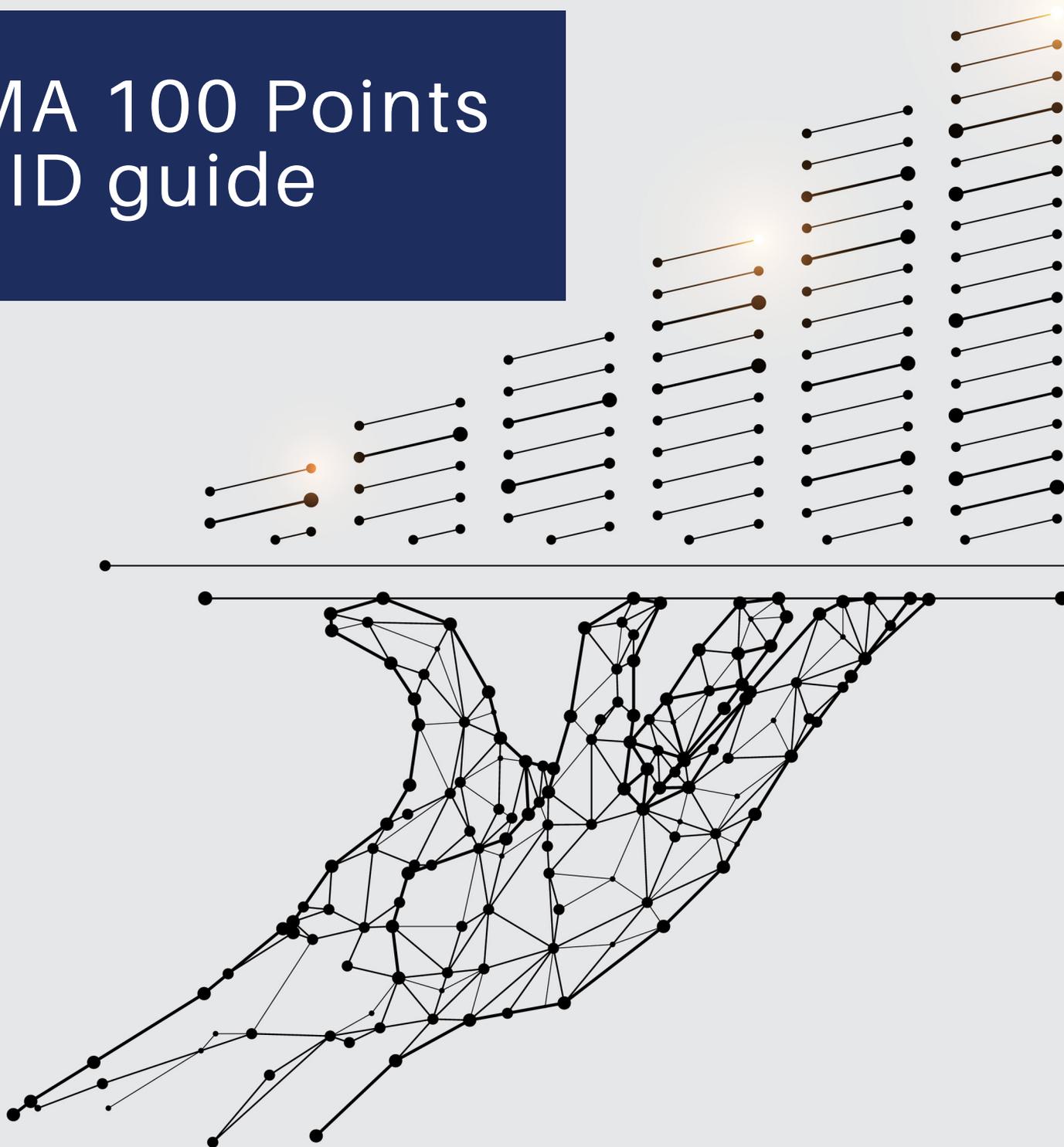


# SMA 100 Points of ID guide



**marcustoday**

We are the experts! Let us take the hassle out of your finances today!



## Who is Marcus Today?

Founded in 1998 by stockbroker Marcus Padley, Marcus Today has grown from a daily note to clients into a leading independent stock market newsletter, with in-depth company research and recommendations, financial market analysis and commentary, trading and technical ideas and model portfolios. The Marcus Today culture of “telling it as it is” has translated into model portfolios which have outperformed the “average” index return due to our superior stock picking and an unbiased and high-conviction approach to portfolio management.

Marcus Today is part of the MTIS Private Wealth, one of Australia’s leading privately owned financial advisory groups, dedicated to empowering clients and their families to build intergenerational wealth through Self-Managed Super Funds.

## Who makes the investment decisions?

The Marcus Today team, headed by Marcus Padley, constantly monitors the model portfolio and makes changes as they are required. The investment strategy involves a combination of approaches to identify attractive companies and their suitability for portfolio inclusion.

## What is a Marcus Today SMA?

Marcus Today is a neutral-style investment manager with a non-benchmark aware philosophy. The investment strategy involves a combination of approaches to identify attractive companies and their suitability for portfolio inclusion, including:

- Fundamental stock analysis, with particular focus on return on equity, future earnings growth and relative valuations (PE relative to historical and peer group).
- Consideration of a “quality” rating through features such as management quality and track record, corporate governance, balance sheet management, company direction and market sentiment.
- Macroeconomic and thematic influences, including the global growth environment, industry structure and position in the investment cycle and investment “themes”. (E.g. the search for yield).
- Technical analysis Marcus Today uses a technical overlay to assist in timing the entry into a stock has already met fundamental, quality and filters. Marcus Today also use technical features to monitor the position and help time any exit.

There are two Marcus Today SMA Model Portfolios, both employing the above investment screening process, however each with their unique investment objectives.

## Why invest in the Marcus Today SMA?

The main benefits of investing into the Marcus Today SMA are:

- Access to Marcus Today stock picking skills and portfolio construction expertise
- Beneficial
- ownership of shares held
- Cost-effective investing with trade netting policy
- Transparency of stocks held within the portfolio
- Automatic rebalancing
- Tax effectiveness – compared to managed funds, investors do not inherit other investors capital gains
- Customisation - personal circumstances and objectives can be accommodated with stock substitution
- Consolidated reporting
- Portability of stocks – ability to move securities into out of accounts at any time



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CLICK TO  
APPLY  
HERE

### How to get into the SMA?

- You pick which type of SMA you would like to open, fill in your application form. An explanation of the different types can be found [HERE](#).
- Attach your 100 points of Certified ID & any relevant pages of Trusts or SMSF document (only the schedule/signatory pages need to be certified).



- We check and certify your application along with your documents and request you also do the same and return a signed application/ page 6 to confirm the open of your account.
- Your SMA account and Investor Portal are set-up for you to view your investments. Investor Portal guide can be found [HERE](#)
- Your funds are transferred in either via BPAY or Direct Debit from your linked bank account (used in the initial application).



OR



- Funds can take 1 – 3 days (especially with BPAY) to be visible in your Investor Portal.
- Once funds are received into your SMA, your funds will be allocated immediately and stocks will be bought and sold on your behalf.
- At Tax time, you will be directly sent your Tax Pack and our SMA admin can produce most Tax documentation you will need. We can usually set-up a data feed for your accountant also, please request this: [sma@marcustoday.com.au](mailto:sma@marcustoday.com.au)

\*\*\*Please note: Praemium SMA's are Audited\*\*\*

## Overview

When you apply for an SMA you must provide certified copies of your documents.

Have your copies certified by someone who:

- is an Australian citizen
- is not related to you (by birth, marriage or de-facto relationship)
- works in one of the occupations listed below

If you are applying from outside Australia and you don't know an Australian citizen, have your documents certified by someone who:

- is a citizen of the country you are in
- is not related to you (by birth, marriage or de facto relationship)
- works in one of the occupations listed below

## Certify copies

- Make a copy of the original document.
- Take the original document and your copy to the certifier.
- They will check your copy is the same as the original.
- On a single-page document, the certifier must write or stamp, 'This is a certified true copy of the original as sighted by me' On documents with more than 1 page, the certifier must write or stamp 'I certify this and the following [number of pages] pages to be a true copy of the original as sighted by me' on the first page and initials all other pages.
- The certifier must also write or stamp on the copy:

1. their signature
2. their full name
3. their occupation
4. their phone numbers
5. the date
6. their address (optional)



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website:  
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## Occupations

- Australian consular officer or Australian diplomatic officer (check if this service is available at your nearest Australian embassy or consulate)
- bailiff
- bank officer with 5 or more years of continuous service
- building society officer with 5 or more years of continuous service
- chiropractor (licensed or registered)
- clerk of court
- commissioner for affidavits
- commissioner for declarations
- credit union officer with 5 or more years of continuous service
- dentist (licensed or registered) fellow of the National Tax Accountant's Association
- finance company officer with 5 or more years of continuous service
- judge of a court
- justice of the peace
- legal practitioner (licensed or registered)
- magistrate
- marriage celebrant licensed or registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961
- master of a court
- medical practitioner (licensed or registered)
- member of Chartered Secretaries Australia
- member of Engineers Australia, other than at the grade of student
- member of the Association of Taxation and Management Accountants
- member of the Australian Defence Force with 5 or more years of continuous service
- member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants
- teacher employed on a full-time basis at a school or tertiary education institution, or
- veterinary surgeon (licensed or registered) member of the Parliament of the Commonwealth, a State, a Territory Legislature, or a local government authority of a State or Territory
- minister of religion licensed or registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
- nurse (licensed or registered) optometrist (licensed or registered)
- permanent employee of Australian, state or local government authority with at least 5 or more years of continuous service.



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Email us at:  
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website:  
[www.marcustoday.com.au](http://www.marcustoday.com.au)

## Certification of Documents Guideline

- permanent employee of the Australian Postal Corporation with 5 or more years of continuous service
- pharmacist (licensed or registered)
- physiotherapist (licensed or registered)
- police officer/psychologist (licensed or registered)
- registrar or deputy registrar of a court
- sheriff

## Certification of Documents Outside Australia Guideline

### Occupations

- Justice of the Peace
- Notary public
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Employee of the Commonwealth or the Australian Trade Commission who works outside Australia.

Primary Documents	Choose (0-1)	Points
You Must Provide either: • one primary document or • At least one secondary document that includes a photograph.	• Australian Passport	70
	• Australian birth certificate (not an extract) or birth card	70
	• Australian citizenship certificate	70
	• International Passport	70

Secondary Documents	Choose (0-1)	Points
Your initial document from this group will be awarded 40 points	• Australian driver licence or learners permit (current)	40
	• Australian photo firearms	40
	• State or federal government employee identity	40
	• Centerlink or social security card (current)	40
	• Department of veteran's affairs card	40
	• Tertiary education institution photo identity	40

Secondary Documents Continued	Choose (0-3)	Points
All documents in this group will attach 25 points.  Only one card from each institution may be counted.	• Australian driver licence or learners permit (current)	25
	• Australian photo firearms licence	25
	• State or federal government employee photo identity	25
	• Centerlink or social security card (current)	25
	• Department of veteran's affairs card	25
	• Tertiary education institution photo identity	25
	• Proof of age card	25

Secondary Documents Continued	Choose (0-4)	Points
All documents in this group will attach 25 points.  Only one card from each institution may be counted.	• Medicare card	25
	• Property lease / rental agreement	25
	• Council rate notice	25
	• Property insurance papers	25
	• A utility bill	25
	• Motor vehicle registration / insurance	25
	• Professional or trade association card	25
	• A financial institution debit / credit card	25
	• A financial institution passbook / statement	25

# Make life simple and invest with Marcus Today

Separately Managed Accounts, allowing our members to invest with us!

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## Marcus Today Stock Market Newsletter

### Testimonials

"I subscribe to your newsletter because you have proven to me that I can trust your no-nonsense approach. (You) help eliminate 'noise' from the market in making decisions (and) provide a wide variety of information, education and advice, all with a good balance of philosophy and humour. You have the members' share market standing at the forefront." **Ian, NSW**

"I am both a trader and an investor and so have different goals, strategies and timeframes to consider and work with. Marcus Today offers me information that enables me to more adequately consider my share choices, without trying to tell me what and how to trade. Marcus Today supports my information management and supplies a real-world view that is often difficult to find elsewhere... often provides insights from a different perspective that I can use to add to my stock selection processes. I like the humour... (and) there is a genuineness to the content that gives me confidence that Marcus Today is trustworthy." **Ross, ACT**

"Essentially a place I can go to get everything I need that is stock related... I really like seeing how you manage the growth portfolio. In particular, what stocks you are adding and why... I also enjoy the humour both Marcus and Henry inject into the newsletter." **Nicole, VIC**

Read more about what our members have to say [CLICK HERE](#)



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