

media release

Ramsay, Tolub and Andronaco launch InvestSense asset consulting services

Tuesday October 21, 2014. Jonathan Ramsay, Jonathan Tolub and Fil Andronaco have announced that their new business InvestSense has commenced business from premises located in the Sydney CBD.

Commenting on the aspirations of the newest entry into the Australian financial services marketplace, spokesperson Jonathan Ramsay said the cornerstone of the business is to assist advisers to help their clients better understand their investment situation.

“Unfortunately, the financial services industry often has a tendency to either blind its constituency with science or oversimplify with unrealistic promises, and sometimes does both at the same time. We want to strike a balance - as Einstein reputedly said ‘to make things as simple as possible but no simpler’. To do this we have a valuation driven approach that integrates everything from asset allocation to manager selection and which is relatively easy to communicate to the end client”.

“It is also clear that the industry has picked up a fair amount of clutter over the years and that the perceived ‘best practice’ in portfolio construction, compliance and advice doesn’t always make things easy for advisers or their clients. We think there is a lot you can do to remedy that situation with the technology that is now widely available and a clean sheet of paper”.

To those ends the InvestSense team will work diligently to make life easier for advisers and their clients by combining contemporary platform technology with a coherent investment process and approach to communication.

Jonathan Ramsay continued, “We can assist dealer groups and their advisers to re-engineer their advice processes and investment offerings in a way that better suits consumer needs”.

InvestSense also believes it can improve investment outcomes with a relatively simple process that has stood the test of time and allows clients to –

- Provide an informed view of prospective returns from different asset classes, funds and securities
- Increase transparency using managed accounts that help investors to help themselves
- Implement models in a way that facilitates a more agile investment process
- Communicate portfolio positioning better
- Ultimately help their clients make better long term decisions based on a common understanding of their needs and portfolio objectives

Jonathan Ramsay concluded, “We are excited about the future and prospects for success and are very confident that the InvestSense business model and marketplace offering will resonate and be very attractive to dealer groups and advisers servicing the needs of high net worth individuals”.

“We are talking to a number of dealer groups and I expect to announce our first major dealer group client signing in the coming weeks”.

The business address and website details of InvestSense are as follows –

InvestSense Pty Ltd
Suite 1004
135 Macquarie Street
Sydney NSW 2000

Web: www.investsense.com.au

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www.investsense.com.au

Media Enquiries:

Mr. Joe Perri
Joe Perri & Associates Pty Ltd
Telephone/Fax: +61 3 9324 0362
Mobile: +61 412 112 545
Email: jperri@joeperri.com.au