



SIGNIFICANT  
INVESTOR VISA SERVICE

YOUR INVESTMENTS



ANZ PRIVATE  
HELPING YOU MANAGE,  
GROW AND PROTECT  
YOUR WEALTH

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# YOUR COMPLETE INVESTMENT SOLUTION

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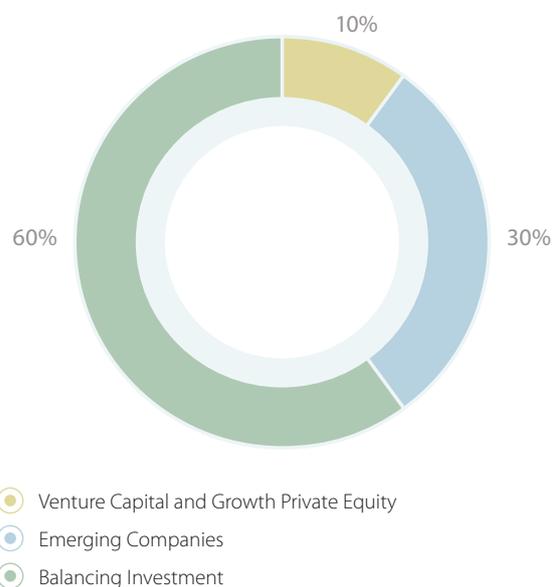
With over 180 years' experience in Australia and a growing presence in Asia, ANZ is uniquely placed to meet the needs of applicants seeking to invest in Australia to satisfy requirements for the Significant Investor Visa (SIV).

ANZ Private's specialist team can provide you with all your banking and investment needs to assist you to meet the visa requirements. That includes giving you access to a range of professionally managed investments that comply with SIV criteria and assistance with settling your family into the Australian lifestyle.

## WHAT CAN YOU INVEST IN?

From July 1, 2015, SIV applicants must invest a minimum of A\$5 million for four years across a range of complying investments, such as in a 'balancing investment', in 'emerging companies' and in 'venture capital and growth private equity'.

ANZ Private offers access to complying investments for each of the three required categories.



# CRITERIA FOR COMPLYING INVESTMENTS



**Balancing Investment**



**Emerging Companies**



**Venture Capital and Growth Private Equity**

## REQUIRED INVESTMENT SIZE

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Up to A\$3 million

A\$1.5 million minimum

A\$500,000 minimum

## INVESTMENT CRITERIA

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A 'balancing investment' in managed funds or listed investment companies (LICs) that invest in a combination of eligible assets including Australian listed securities, eligible corporate bonds or notes, annuities and real property (subject to the 10 per cent limit on residential real estate).

Investments in eligible managed funds or LICs that invest in emerging companies.

- Investments in eligible Australian venture capital or growth private equity (VCPE) funds investing in start-up and small private companies.
- Fund must be registered under the Early Stage Venture Capital Limited Partnership (ESVCLP) or Venture Capital Limited Partnership (VCLP) operated by the Department of Industry, Innovation and Science.



HELPING YOU PLAN FOR  
THE FUTURE

# OUR COMPLYING INVESTMENTS

## ANZ PRIVATE INVESTMENT MANAGEMENT SERVICE

The ANZ Private Investment Management Service (IMS) gives you your own separately managed account (SMA) to which your investments are allocated.

This enables ANZ's investment professionals to manage your funds across multiple asset classes while you maintain beneficial ownership of the assets.

Your investment options in the IMS include:

- Australian Fixed Income
- Australian Enhanced Yield
- Australian Equities – Growth
- Australian Equities – Income
- Australian Cash and Money Markets.

## UBS AUSTRALIAN SMALL COMPANIES SIV FUND

The UBS Australian Small Companies SIV Fund identifies and invests in companies with a positive medium-term outlook in terms of sustainable free cash flows, returns and growth potential.

The fund will hold between 30 and 90 small company stocks, each of which has a market capitalisation of less than \$500 million at initial purchase by the fund. The fund can invest up to 10 per cent in New Zealand listed securities and up to 20 per cent in cash.

## STAFFORD GROWTH FUND 5\*

The Fund 5 uses a manager-of-manager approach to identify the best available managers that specialise in venture capital and growth private equity.

The fund targets around three to five funds with around 25 to 40 underlying companies per commitment pool.

### BENEFITS OF THE ANZ PRIVATE IMS

- **Professional management.**  
Access some of the world's leading investment managers, hand-picked and monitored by ANZ's Chief Investment Office.
- **Flexibility and choice.**  
Invest in one or a combination of complying investment options.
- **Tax awareness.**  
Avoid 'embedded' capital gains typically associated with unitised managed investments and receive income and franking credits as you earn them.
- **Comprehensive reporting.**  
Access your account information online to view transaction, valuation and taxation reporting for your portfolio, and receive detailed quarterly updates from the investment management team.

\* The Stafford Growth Fund is not offered with the ANZ Investment Management Services but is available to SIV investors on a stand alone basis.



