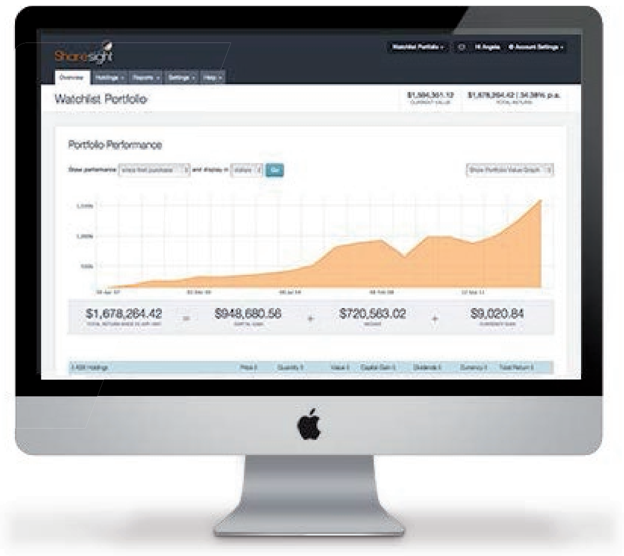
Sharesight PRO

Bay Financial Partners

Perfect Portfolio Management

We think advisors and their clients already have enough paperwork. That's why we've teamed up with Sharesight - to take the hassle out of managing your share portfolio.

Sharesight is a cloud-based portfolio tool that gives you online access to stock and fund performance and a host of other features. But the best thing about it is how it ends the paper trail.



Dividends and adjustments are automatically accounted for and each trade is automatically added to your portfolio. Once your portfolio is established we'll integrate it with Xero to make bank reconciliation a breeze.

You'll find Sharesight easy to use, accurate and it will save us both time. Plus you'll get a portfolio tool that helps you manage your investments by removing the paperwork.

All the features you want, without the clutter

PDF CONTRACT NOTE

Real-time trades – no more data entry

When you make a trade, simply email your contract note to Sharesight and your portfolio will be instantly updated with the transaction. Or instruct your broker to do it for you. No more data entry.

Automates dividends and adjustments

Sharesight automatically calculates and records dividend payments (including tax credits) and automatically adjusts for share splits, name changes, capital returns and other corporate action events.

Performance reporting

Sharesight automatically calculates the performance of your portfolio and each share holding and fund position within it. That makes comparisons with other investment options is easy. Rank your shares by performance, identify non-performers and improve your decision making.

xero NETWORK PARTNER

Xero Integration

Connect your Sharesight portfolio to your Xero account and have details of share purchases, sales and dividends automatically reconciled against your bank statement and included in your financial accounts. Furthermore, Sharesight can pull in your bank account balances and cash investments, so your total financial position is displayed right within your portfolio.

Portfolio sharing

Share your portfolio with us so we can easily get the information we need without having to hassle you for it.

High standards, happy customers

"**I love Sharesight for its daily 'keeping me in the picture'.** It's just good information to know exactly where things are, especially with retired people like ourselves. You have the option of calculating the market value of your portfolio from the initial purchase, or whether it's your current financial year. I think those are all very good tools."

Jean Warder

“**It allows you to understand exactly how your investments are going.** The reports are incredibly helpful because you can actually see future income and what you’re going to get. So when you’re doing your end-of-year stuff, when you integrate with Xero, you can see dividends that have been declared but not paid, which is very handy. And you can actually do those adjustments prior to submitting it to the accountant.”

Peter Naude, Outsourced Resource Pty Ltd

“Having one set of data, accessed via username and password by three different invited parties, has been huge. **No more folders full of stuff, contract notes going missing, etc.** Less meetings and more collaboration over email and phone – saves lots of time.

Just knowing it could function across the NZ and Australian markets – handling both equities and debt securities – was a major plus for me.”

David Wilson

Contact your advisor to sign up today...

Bay Financial Partners Limited
PO Box 843
Seventh Avenue
Tauranga
Phone: 07 578 3863
Email: admin@bayfinancialpartners.co.nz
Website: www.bayfinancialpartners.co.nz