

**GROW, MANAGE  
AND PROTECT YOUR WEALTH**

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# **SIGNIFICANT INVESTOR VISA SERVICE**

**YOUR PATHWAY TO PERMANENT  
RESIDENCY IN AUSTRALIA FOR YOU AND  
YOUR FAMILY**

**AUSTRALIAN SIGNIFICANT  
INVESTMENT VISA  
188C & 888 VISAS**

# HELPING YOU PLAN FOR YOUR FUTURE





# ABOUT

We are committed to helping high net worth individuals and families grow, manage and protect their wealth. Our focus is to define our client's vision of success, understand their passion and commit to achieving their goals.

FinPeak Advisers is a Corporate Authorised Representative No. 1249766 of Aura Wealth Pty Ltd AFSL No. 380552.

We provide a complete range of investment solutions including:

- Property funds
- Fixed income
- Bonds
- Domestic equities
- International equities
- Private equity

These investment solutions are carefully selected to comply with the SIV investment framework.

FinPeak and Aura Wealth have offices in Sydney, Melbourne, Singapore and Thailand.

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**WE'RE COMMITTED  
TO ACHIEVING OUR  
CLIENTS' GOALS**

# OVERVIEW

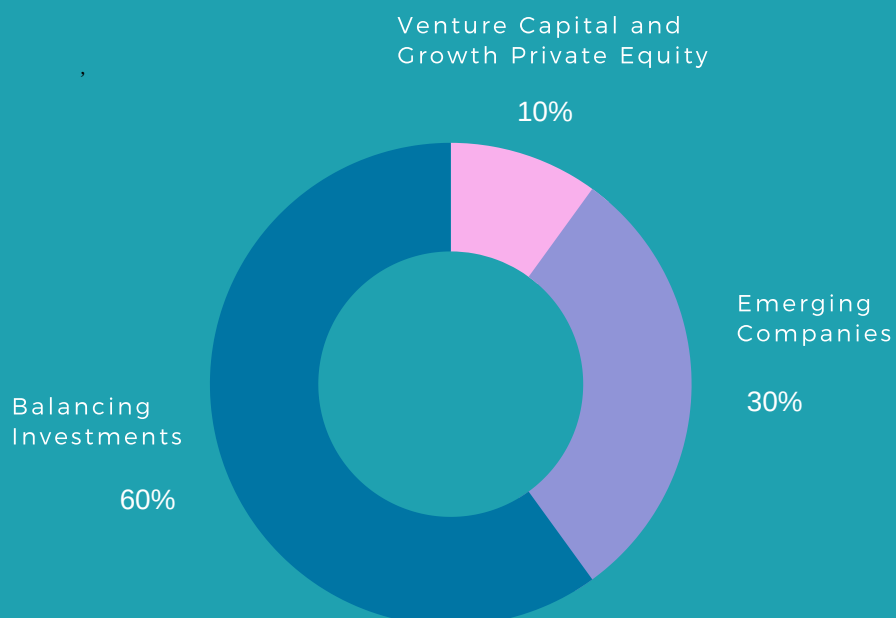
From 1 July 2015, SIV applicants must invest a minimum of AUD \$5 million for four (4) years across a range of complying investments. These complying investments include 'venture capital and growth private equity', 'emerging companies' and a 'balancing pool of investments'.

Subject to satisfying government requirements, the visa provides work, travel and study rights to the applicant as well as their immediate family and dependent relatives.

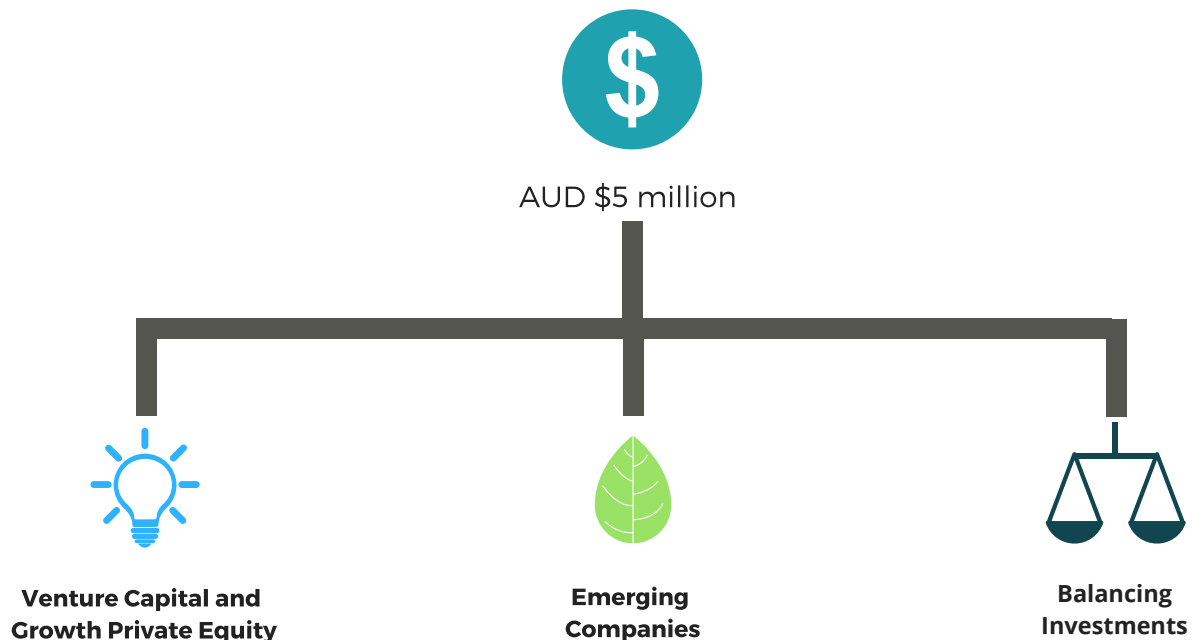
There are no upper age limits or language requirements.

Applicants do not need to satisfy the innovation points test.

## INVESTMENT CRITERIA



# INVESTMENT ALLOCATION



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## INVESTMENT SIZE

AUD \$500,000 minimum

AUD \$1.5 million minimum

Up to AUD \$3 million

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## INVESTMENT CRITERIA

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.

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

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).

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WELCOME TO  
YOUR NEW HOME

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# WHAT WE OFFER

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## **INVESTMENTS ARE ADMINISTERED THROUGH AN INVESTOR DIRECTED PORTFOLIO SERVICE (IDPS)**

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### **EXPERIENCED TEAM**

Professionals who understand the visa application process.

### **PROFESSIONAL MANAGEMENT**

Investment specialists with decades of experience in handpicking some of the world's leading investment managers

### **COMPLYING INVESTMENT SOLUTIONS**

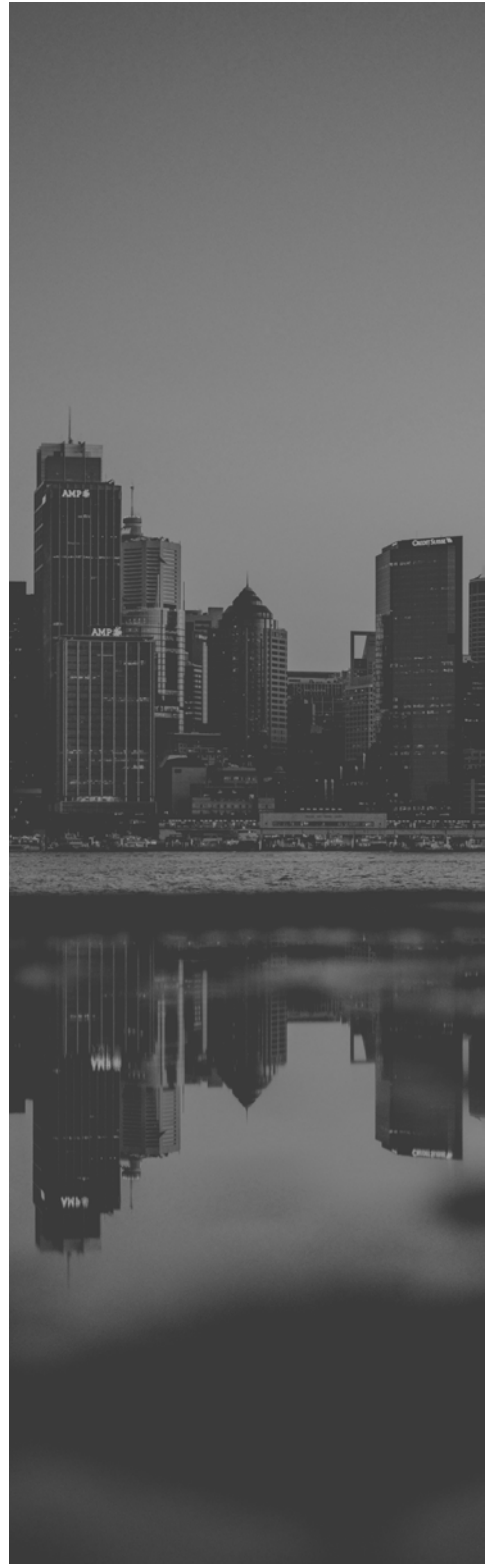
Access to a wide range of investments to choose from. Some of the managers we have access to include: Aberdeen, Macquarie, Challenger, Aura Group, Colonial First State, Moelis, UBS, Yarra just to name a few.

### **CUSTOMISED PORTFOLIO**

Bespoke portfolios constructed based on your objectives for growth, income and risk appetite.

### **COMPREHENSIVE REPORTING**

Access your account information 24/7 anywhere you have web access to view all your transactions, valuation and tax reporting on your portfolio. Receive a detailed quarterly report from your investment team.





## SIGNIFICANT INVESTOR VISA SERVICE

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# CONTACT US

Meet FinPeak

Michael Sik

Private Wealth Adviser

☎ +61 404 446 766

✉ [michaels@finpeak.com.au](mailto:michaels@finpeak.com.au)

FinPeak Advisers

Level 2, 383 George Street

Sydney, NSW 2000

[www.finpeak.com.au](http://www.finpeak.com.au)

Aura Wealth

Level 24, 52 Martin Place

Sydney, NSW 2000

[www.aura.co](http://www.aura.co)

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This brochure is current as at November 2018 and the details in it are subject to change.

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**FINPEAK**  
ADVISERS