

Stockspot Partner Program

Partner program benefits

As a Stockspot partner, you'll gain access to Australia's most sophisticated robo-advice software, education, and support. We'll help you look after your clients and grow your business.

As more of your clients invest with us, you'll progress to a higher tier level and enjoy even more benefits.



Total client balance	Up to \$500k	>\$500k	>\$5m	>\$20m
Access to Australia's largest robo-adviser				
Membership to the Stockspot Partner Program	✓	✓	✓	✓
See all of your clients in one place	✓	✓	✓	✓
Access to your client portfolios and profiles	✓	✓	✓	✓
Ongoing investment advice for your clients	✓	✓	✓	✓
Annual portfolio reviews for your clients	✓	✓	✓	✓
Performance reports and tax documents	✓	✓	✓	✓
Bespoke portfolio reports to make your life easier		✓	✓	✓
Resources to differentiate and grow your business				
Access to articles and videos to educate your clients	✓	✓	✓	✓
Free subscription to the Stockspot monthly newsletter	✓	✓	✓	✓
Stockspot marketing materials for your team and clients	✓	✓	✓	✓
Hard copies of Stockspot ETF research for your clients		✓	✓	✓
Dedicated Stockspot account manager		✓	✓	✓
Class Super integration for your SMSF clients			✓	✓
Access to Stockspot guest speakers for your client events			✓	✓