



# A new and better way to invest

Helping your business stay one step ahead

**Lonsec**

# Build value for your business and clients

During a time of heightened market volatility, rising professional standards, and growing client expectations, building value in the financial advice industry is becoming ever more challenging.

At the same time, the role of the adviser is becoming increasingly critical. Clients require advice on a wide range of issues, and advisers need the flexibility to focus on providing genuine, goals-based advice. Creating value for your clients and your business requires not only a change in process but a shift in perspective.

Managed accounts help you unlock value by placing you at the centre of the advice process. They allow you to access a large and diverse team of experts to build and manage portfolios on your client's behalf, giving you more time to focus on giving high-value, strategic advice that's tailored to your client's objectives.



# More advisers are turning to managed accounts

Managed accounts have rapidly become a trusted solution for advisers, and their clients are increasingly becoming aware of the benefits.

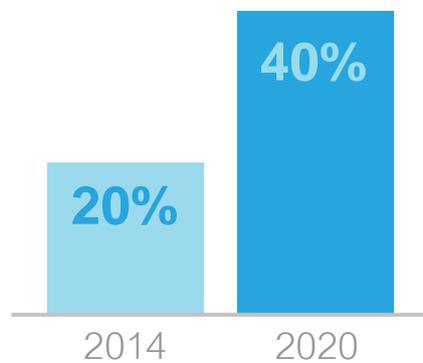
**13**  
hours  
saved each week  
on average

Advisers using  
managed accounts  
have

**18%**

more clients than  
those that are not

Proportion of advisers using  
managed accounts has  
doubled since 2014



**3x**  
growth  
in flows  
to managed  
accounts in the  
past five years

Don't miss out on these benefits for both your clients and your business.

Source: SSGA, Investment Trends, Colonial First State

# How managed accounts enhance your advice value proposition

Managed accounts have become a popular way for financial advisers to scale their investment solutions and achieve greater efficiency and regulatory compliance.

But advisers are also starting to realise how powerful managed accounts are in transforming client conversations and giving them a greater stake in the advice process. Managed accounts have shifted advice from a time-intensive, admin-dominated business to one focused on objectives, client education and communication.

By outsourcing the investment side of advice to a professional portfolio manager, advisers can demonstrate their commitment to an objectives-based approach that avoids conflicts of interest, draws on a wide range of quality investment products, and incorporates high-conviction ideas.

## How managed accounts benefit the adviser

### Greater efficiency

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Reduce time associated with portfolio implementation, creating more time to work on your business or growing your client base.

### Best interest duty

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Avoid potential conflicts of interest and support your best interest duty by providing investment solutions managed by external parties.

### Stronger client relationships

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Less paperwork and administration creating more time to focus on strategic advice and enhancing the value of your financial advice offering.

### Improved risk management

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Your client's portfolio is underpinned by a professional investment process and remains within the required risk management obligations.

### Lower costs

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The significant reduction in compliance and reporting means advice businesses can reduce admin overhead.

### Deeper client conversations

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Reporting and communications from the portfolio manager can be used to show how the client's objectives are being met.

# Reduce your compliance burden

Managed accounts can help you meet your statutory and professional duties by outsourcing investment selection decisions to professional portfolio managers.

With Lonsec's managed accounts you can access institutional grade solutions that are based on market leading research, meaning you avoid potential conflicts of interest while spending less time on monitoring and reporting.

## Focus on delivering high-value, strategic advice

Whether its early access to super, cash flow management, or strategic business advice, clients are looking to their advisers for a holistic, goals-based solution.

By relying on Lonsec's professional portfolio managers, you are enabled to provide strategic investment advice, managing the strategic asset allocation, and reviewing and rebalancing the investment mix in line with your client's objectives.

## Have deeper conversations with clients

Lonsec's managed accounts bring the role of the adviser to the forefront of the wealth management process.

Regular market insights and accessible portfolio reporting support in-depth client conversations, allow you to demonstrate the value of your advice, and give you the freedom to focus on attracting and retaining clients.

## Enhance the value of your practice

By outsourcing the day-to-day portfolio management to experienced investment professionals, you can unlock value in your advice practice that is independent of your people and processes.

This means you have continuity in your business's value that stays the same even when key people leave or internal processes change.

# Your clients will reap the benefits too

## Your client needs an investment solution that is:

## With a managed account:

Aligned to their needs

Your client can invest in a range of high-quality portfolios that are aligned to your risk preferences and objectives.

Managed by an experienced team

Highly experienced investment teams manage and monitor the managed account portfolio in line with the portfolio's mandate.

Transparent

Your client can easily view the assets and transactions in your managed account portfolio, and track against relevant benchmarks.

Responsive to market changes

Investment decisions are implemented quickly so you can capture market opportunities or manage risks as soon as they appear.

Portable

Depending on the investment structure, capital gains tax may not be applied if your client transfers any investments into or out of a managed account structure.

Cost efficient

Netting of trades may minimise buys and sells, which in turn reduces trading fees and transaction costs.

Efficient and simple

Your client can benefit from an actively managed, multi-asset portfolio with a cost-effective and competitive pricing structure.

# We're here to help with the managed accounts conversation

If you've been thinking about ways improve your financial advice practice, look no further than Lonsec's managed accounts. The good news is that managed accounts are flexible, your clients can start small and build up from there.

Lonsec have a team of specialists to support you, from the initial discussions with your clients all the way through to implementation phase.

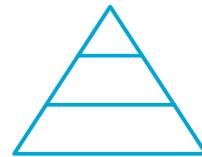
Lonsec provide an ongoing service to ensure that you and your clients reap the benefits of managed accounts as soon as possible.

# Why Lonsec?

Lonsec is the research house of choice for advisers and fund managers. With unprecedented access to the investment teams behind every product we rate, we leverage the depth and breadth of our research to help you achieve better investment outcomes.



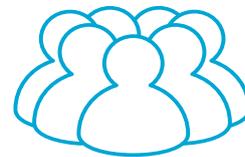
Lonsec's managed portfolios are available through a number of major platforms including AMP MyNorth, BT Panorama, HUB24, Macquarie Wrap, Netwealth and Praemium



A diverse product suite to meet the different needs of individual investors.



Ongoing support by a dedicated BDM and access to Lonsec's investment team, who can provide additional insights.



Backed by an experienced team of over 65 research analysts with deep knowledge of the investment product market.



A 20-year track record of managing investments through various market cycles.



Strong risk-adjusted performance, including through challenging market environments.

# Want to find out more?

Get in touch today to find out how we can help you start implementing managed portfolio solutions for your clients. Call us on **1300 826 395** or email **[info@lonsec.com.au](mailto:info@lonsec.com.au)**

**[Lonsec.com.au](http://Lonsec.com.au)**

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