

Lonsec Managed Accounts

Platform minimum initial investment amount

Managed Portfolios	AMP MyNorth	BT Panorama	CFS FirstChoice	FinClear	HUB24	Macquarie Wrap	Netwealth	Praemium
Multi-Asset Managed Portfolios – Defensive	Not available	\$25,000	Not available	Not available	Not available	Not available	Not available	Not available
Multi-Asset Managed Portfolios – Conservative	Not available	\$25,000	Not available	Not available	Not available	\$25,000	Not available	Not available
Multi-Asset Managed Portfolio – Balanced	Not available	\$25,000	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available
Multi-Asset Managed Portfolio – Growth	Not available	\$25,000	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available
Multi-Asset Managed Portfolio – High Growth	Not available	\$25,000	Not available	Not available	NO MINIMUM	Not available	\$25,000	Not available
Listed Managed Portfolio – Balanced	Not available	\$25,000	Not available	NO MINIMUM	NO MINIMUM	\$100,000	\$50,000	NO MINIMUM
Listed Managed Portfolio – Growth	Not available	\$25,000	Not available	NO MINIMUM	NO MINIMUM	\$100,000	\$50,000	NO MINIMUM
Listed Managed Portfolio – High Growth	Not available	\$25,000	Not available	NO MINIMUM	NO MINIMUM	\$100,000	\$50,000	NO MINIMUM
Retirement Managed Portfolio – Conservative	\$500	\$25,000	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available
Retirement Managed Portfolio – Balanced	\$500	\$25,000	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available
Retirement Managed Portfolio – Growth	\$500	\$25,000	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available
Sustainable Managed Portfolio – Balanced	Not available	Not available	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available

Sustainable Managed Portfolio – Growth	Not available	Not available	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available
Sustainable Managed Portfolio – High Growth	Not available	Not available	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available
Lonsec Active (FirstChoice Managed Account Range: Defensive)	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available	Not available
Lonsec Active (FirstChoice Managed Account Range: Conservative)	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available	Not available
Lonsec Active (FirstChoice Managed Account Range: Moderate)	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available	Not available
Lonsec Active (FirstChoice Managed Account Range: Balanced)	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available	Not available
Lonsec Active (FirstChoice Managed Account Range: Growth)	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available	Not available
Lonsec Active (FirstChoice Managed Account Range: High Growth)	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available	Not available
SMA s	AMP MyNorth	BT Panorama	CFS FirstChoice	FinClear	HUB24	Macquarie Wrap	Netwealth	Praemium
SMA – Core	Not available	\$25,000	Not available	NO MINIMUM	NO MINIMUM	\$25,000	Not available	NO MINIMUM
SMA – Income	Not available	Not available	Not available	NO MINIMUM	NO MINIMUM	\$25,000	Not available	NO MINIMUM
Listed Managed Portfolio - Emerging Leaders *	Not available	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available
Listed Managed Portfolio - Listed Income *	Not available	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available

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