

What is a managed portfolio?

Managed portfolios, sometimes called managed accounts, are a portfolio of managed fund investments held in your name which are selected and managed by a professional investment manager. The manager operates on your behalf, in alignment with your outlined portfolio objective.

Driven by technological advancements, managed portfolios offer numerous benefits to investors including full transparency of the underlying assets, exposure to different investment sectors and higher performance potential, without the administrative burden of managing these investments separately.

What are the benefits of a managed portfolio?



Expert investment management

Your portfolio will be run by an investment specialist which has been researched and selected by your adviser to suit your specific investment needs.



Higher performance potential

Managed portfolios can adapt to market conditions as the investment specialist has the authority to implement trades on your behalf. This can provide exposure to the best investments available at the right time, maximising performance potential and reducing risk in your portfolio.



Stronger compliance & efficiency

Managed portfolios operate as a Managed Investment Scheme under Corporations Law so they must adhere to strict governance and regulatory requirements. The structure enables your adviser to ensure that your portfolio is managed and maintained within the agreed risk profile at all times. It also ensures your portfolio is rebalanced and updated alongside every other client, aligning with your adviser's best interest duties.



Greater transparency

Detailed portfolio reports enable you to see where your money is invested right down to the individual asset, as well as all investment changes made on your behalf. Your adviser has access to deeper insights through regular communication with their chosen investment specialist, helping deliver great outcomes for you.



Less paperwork

Your portfolio can be updated efficiently and rebalanced regularly within clearly identified guidelines, without you needing to sign additional paperwork.



More time to plan for your future

Managed portfolios gives you and your adviser more time to talk about your personal financial goals and the strategies available to help you achieve them.