





Keynote address

**Maximising the Managed Accounts
Opportunity**

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Significant growth









This new total shows just how significant managed accounts in their various forms have become. They now amount to the equivalent of nearly 7% of the Platforms and Wraps total FUA of around \$600bn.

Toby Potter, Chair of IMAP

Source: Managed Accounts FUM Census, 2016








What's the current situation?


Adviser pain points*

-  **Admin, email, paperwork and compliance**
-  **Increased regulation**
-  **Scalability of current processes**
-  **Managing risks**
-  **Cost and margin pressures**
-  **Managing growth**

*Source: Macquarie 2015/16 AFS Benchmarking

How can Managed accounts help?

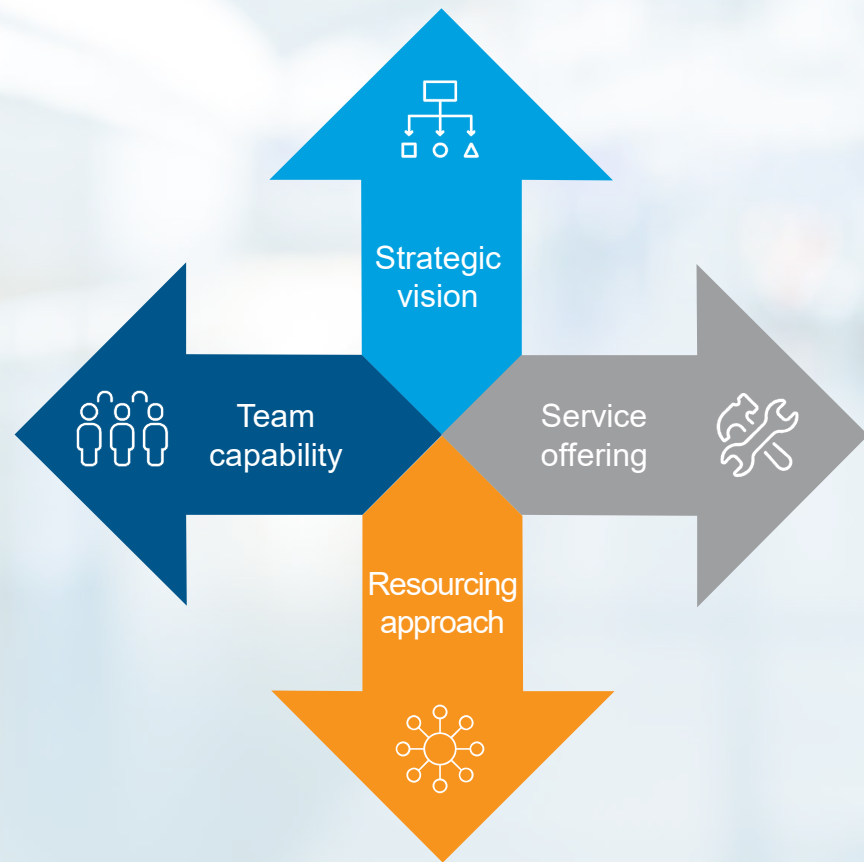
-  **Scalable portfolio management**
-  **Reduction in total cost to client**
-  **Efficient and quality data feeds**
-  **Reduced corporate action management**
-  **Reduced admin staff and tasks**
-  **Risk reduction**
-  **Freeing up of time to dedicate elsewhere**



But what do I tell
my clients?





Pivoting
your business
to deliver
on these
drivers



Use the Managed Accounts opportunity to maximise the future success of your business



Source: Managed Accounts FUM Census.



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