

## **Press Release -**

### **IMAP Announces Managed Account Awards Finalists**

30 May 2019

The Institute of Managed Account Professionals (IMAP) has announced the finalists of the 2019 IMAP Managed Account Awards.

The awards cover both single sector asset classes and multi asset class programs which generally have a range of risk profiles or other goal based objectives. In addition, there is an award specifically for managed account programs offered by Advice firms that are integrated into the advice process.

There is also an innovation Award for the service which does most, in the judge's opinion, to advance the development of managed accounts.

"Managed accounts are becoming a significant part of the advice profession, with many managers and licensees now offering portfolios. The managed account programs that are offered by advice firms are an important development that we want to recognise" said Toby Potter, Chair of IMAP. "We want the IMAP Managed Account Awards to be a recognition of excellent practice among advice firms. The managed account programs they offer are operated largely out of sight and the best are well resourced, carefully thought through, have a clear investment philosophy with decent track records and deserve to be recognised."

To adjudicate the awards, IMAP has convened a panel of independent researchers and other specialists –Angela Ashton, Dominic McCormick, Nigel Douglas, Brad Matthews, Paul Saliba, Mark Oliver and Stuart Alsop.

The finalists are:

#### **Licensees Managed Accounts**

- Canaccord
- Crystal Wealth
- Prime Financial Group
- Royston Capital
- Stanford Brown
- Viridian Advisory

#### **Innovation**

- BTFG
- Investum
- JB Were
- Nucleus Wealth
- Praemium
- Resonant

#### **Australian Equities**

- Antares Equities
- Blackmore Capital
- Elston Asset Management

- Perpetual Private
- Watershed Funds Management
- DNR Capital

#### Australian Equities Small Cap

- Macquarie Investment Management
- Watershed Funds Management
- Infinity Asset Management
- Pearl Funds Management

#### International Equities

- Loftus Peak
- Nucleus Wealth
- Pearl Funds Management
- Private Portfolio Managers
- Royston Capital
- Watershed Funds Management

#### Multi Asset Class

- Canaccord
- Infinity Asset Management
- Resonant
- Shaw and Partners
- Soteria Capital
- Watershed Funds Management

#### Australian Fixed Interest

- JB Were
- Mason Stevens
- Prime Financial Group
- Real Asset Management
- Royston Capital

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### About the Panel of Adjudicators

**Stuart Alsop** is Head of Data Australia / New Zealand for FE. After working in the FE offices in London for many years where he held various senior data analyst roles, Stuart moved to Sydney in 2015 to run the Australian & New Zealand fund database covering Managed Funds, ETFs, LICs and domestic Equities, providing purely quantitative information to the financial services industry.

**Angela Ashton** co-founded Evergreen Consultants and has 25 years experience in investment markets. She has held senior investment roles at QIC, and was Head of Ratings at van Eyk Research and Lonsec. She holds a BSc, BEcon, MComm (Fin), is a Fellow of FINSIA and completed the CIMA qualification.

**Nigel Douglas** is Chief Executive Officer (CEO) at Douglas Funds Consulting Pty Ltd which is an independent research firm that undertakes customised fund and client specific research projects as well as investment committee and non-executive director roles.

Mr Douglas has over 30 years financial markets experience with high level expertise in investment manager research, asset allocation and macroeconomics.

**Brad Matthews** has over 30 years experience in the finance industry and is a highly regarded investment strategist. After working in the money and foreign exchange markets in the mid-1980s, Brad held various economist roles at St. George Bank. He then moved into executive management positions at St. George, including being the Head of the Cards and ATMs division. Prior to establishing his own investment consultancy business in 2015, Brad worked in investment research at the AMP Group for 12 years, which included roles as Head of Research and Head of Investment Strategy for AMP Group financial planning licensees.

For the past 24 years, Brad has been editor of a newsletter known as “Plain English Economics”, which is read by secondary students studying economics.

Brad’s formal qualifications include a Bachelor of Commerce with merit from the University of NSW, a Certificate in Financial Planning and a Graduate Diploma in Applied Finance and Investment.

**Dominic McCormick** has worked in financial services and investment management for 33 years. He co-founded multi-asset and alternatives manager Select Asset Management in 2002 which was sold to OveVue Limited in 2014. He is the Portfolio Manager of the Select Listed Investments Fund and the Select Real Return Fund. He also provides investment consulting services with a focus on portfolio construction, real return investing and listed funds.

**Mark Oliver** is head of Managed Accounts for Macquarie Wealth Management. He has 30 years international and local experience in wealth management across both the business and technology. Mark has worked in government and personal superannuation, life insurance, Wrap platforms, online trading and managed accounts. Prior to joining Macquarie in 2007 Mark managed his own consulting company, primarily consulting to large Wrap platforms on product and technology development. In his current role Mark is involved in determining which investment managers are added to the SMA menu

**Toby Potter** is Chair of IMAP and has worked in developing managed accounts programs since 2004.

**Paul Saliba** is Founder and Managing Director of Evolutionary Portfolio Services. Paul is an investment specialist having joined the industry in the late 1990s with roles including Supervisory Analyst roles with Citigroup and Credit Suisse and within ANZ Asset Management. Paul has also worked closely with financial planning practices and planners and their clients since 2008, Paul has worked in roles, such as, Chief Investment Officer of Lachlan Partners, Portfolio Manager at Mosaic Portfolio Advisers and Head of Equities & Portfolio Construction at IOOF. At IOOF Paul was the investment manager for the Managed Account (and model) portfolios across the group with in excess of \$2.6billion under management. He was also a responsible manager on the AFSs of the MDA provider and two of the advice businesses.

