



Managed accounts in practise

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June 2014



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Why are managed accounts finally gaining momentum?

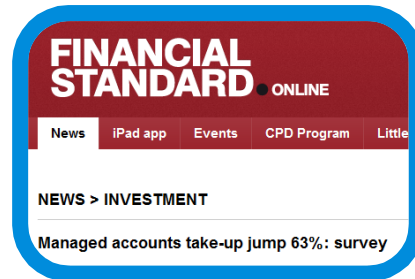
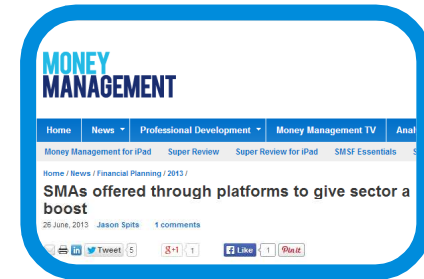
Growth and potential

Why now?

Managed account technology has evolved

Business efficiency is more important than ever

Managed accounts can deliver time and revenue



Benefits beyond the portfolio



Options to support your business



Model portfolios – Adviser and licensee

Adviser/licensee create
and maintain models

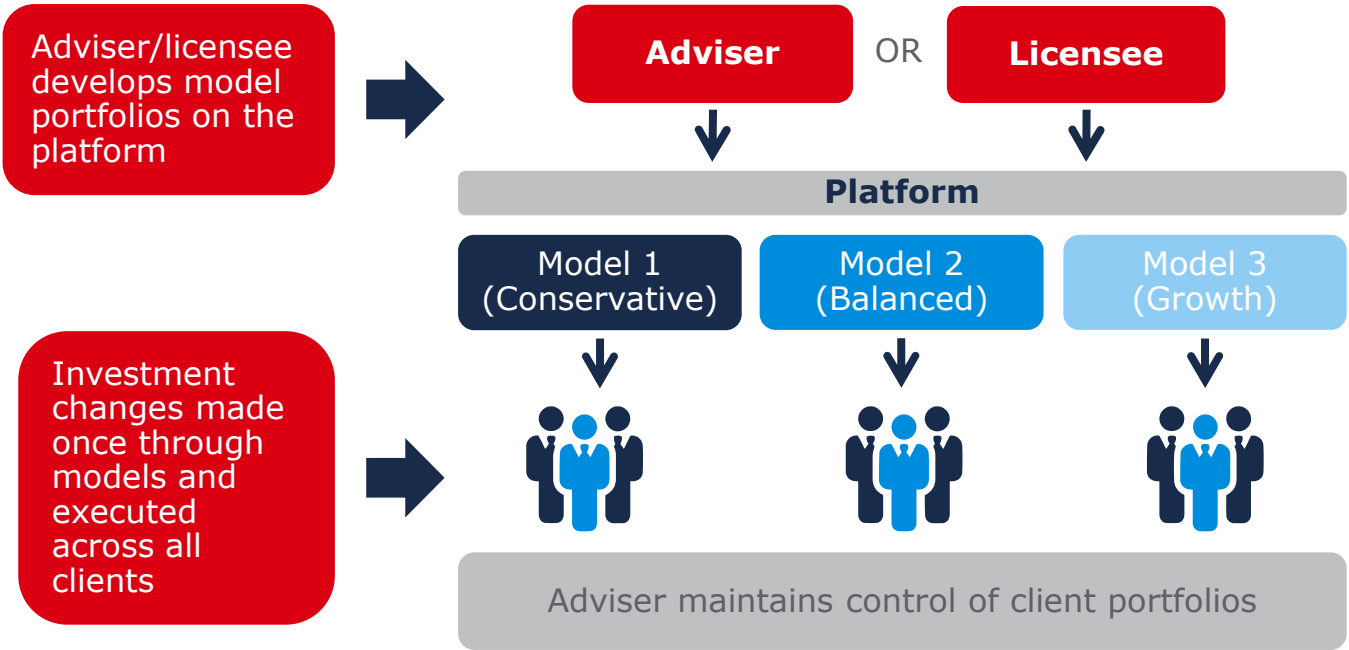
Efficiency through
centralised portfolio
management



Managed accounts

Licensee manages
portfolios and executes
changes across all clients

Adviser and licensee models available today



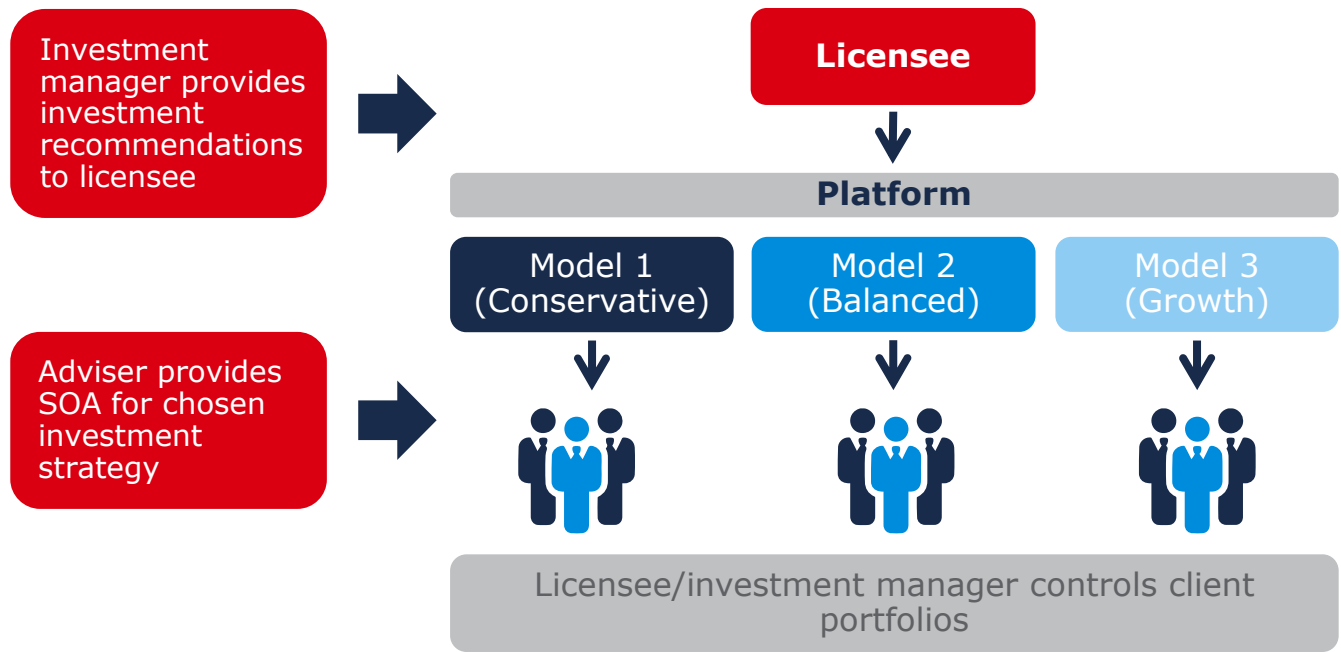
Key considerations

- MDA
- Limited MDA
- Ongoing consent

- Licensee model portfolio fee



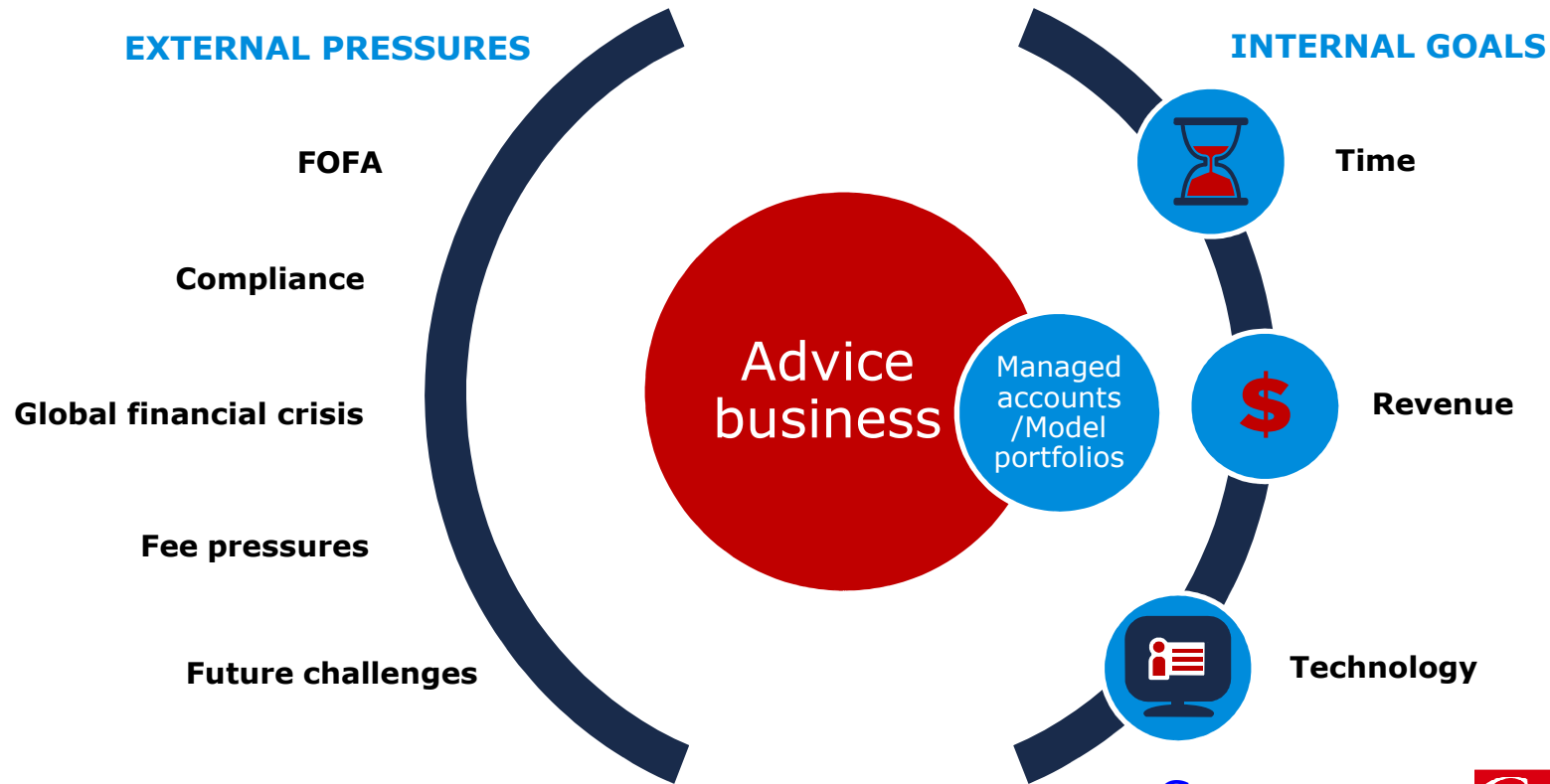
Managed account solutions in practice



Examples

- SMA
- IMA
- MDA + models

Are managed accounts here to stay?



Crowne



Thank You

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