
The benefits of BT's managed accounts

Client guide



Professional investment advice delivered through BT's managed accounts

Through your adviser managed accounts can provide access to professional investment management expertise to help achieve your investment goals. BT Panorama offers a suite of managed account solutions providing access to a wide range of professionally managed portfolios across a range of investment styles and asset classes. Whatever your stage of life – building wealth or retirement – BT's managed accounts can allow your investment portfolio to reflect your individual investment objectives.

What is a managed account?

A managed account is an investment portfolio that is overseen by a professional investment manager, who looks after the day-to-day investment decisions and implements the investment strategy as determined by your financial adviser.

The structure of managed accounts allows you to see exactly how your money is invested at any time by providing you and your financial adviser full visibility of the underlying assets in your portfolio, including any related transactions, performance and fees, a feature which is generally not readily available with managed funds. Managed accounts provide several benefits not available through managed funds.



Here are some of the benefits a managed account can provide:



Better focus on maximising investment outcomes and understanding

Free from the day-to-day responsibilities of individual portfolio management, your financial adviser can use that time to better align your goals and objectives and monitor your investment strategy. Plus, they can better engage with you through additional communications provided by the professional manager. This can contribute to improving your knowledge and understanding whether your investment is meeting your personal objectives.



Quick implementation of ideas

Utilising BT's platform and managed accounts capability, your adviser can implement or modify your investment strategy as required by investing or switching into the portfolio that suits your needs.



Helping improve portfolio outcomes

By taking a thorough approach to selecting from the broad range of available investment managers and portfolios, you and your adviser can feel more confident that the choice of the investment manager and portfolio will deliver your expected investment outcomes.

Here are some of the benefits a managed account can provide:



Clear and concise reports

The transparency offered by managed accounts allows you to see all your portfolio holdings and changes, making it easier for you and your adviser to have quality discussions about how your portfolio is working in line with your investment strategy. Through our BT Panorama mobile app or desktop, you can access portfolio details online 24/7 and know what your portfolio is doing with comprehensive administration and consolidated, transparent reporting.



Beneficial ownership of listed securities

Through managed accounts you beneficially own the assets within your portfolios and may potentially benefit from the same income, dividends, franking credits and capital growth that come from direct ownership.



Professional portfolio management based on your investment needs

Highly qualified and experienced professional investment managers oversee your portfolio within defined parameters so that it remains aligned to your chosen investment style or strategy.

[Speak to your adviser to find out more](#)

BT offers several managed account options, speak with your financial adviser for more information.

Risks associated with managed accounts

You should be aware of the risks when investing. No matter how skilled the investment managers, or how strong the performance of the Model Portfolio is, there is always a chance you could receive less than you invested.

The future performance of any specific Model Portfolio offered through this product is not guaranteed.

For more information

1300 881 716 (Clients)



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BT18564-0522