



Implemented  
**Portfolios**



Creating engaging  
investing experiences

[www.implementedportfolios.com.au](http://www.implementedportfolios.com.au)

# Your scalable IMA solution

*Implemented Portfolios is changing the way that investment management conversations take place in advice businesses across the country.*

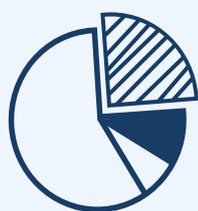
It was started with a desire to see the relationships between advisers and clients develop and flourish.

Our mission is to help advisers break free from the pure “investment manager” mould and step deeper into the role they were designed to do – helping their clients live their best lives.

By providing financial advisers with a technology enabled, individually managed account (IMA) service, we free up precious business hours and streamline the advice process, allowing both advisers and clients to focus on their financial values and goals.

## Your Investment Management Service

At Implemented Portfolios, we pride ourselves on offering an exceptional IMA solution that allows advisers to spend less time in their back office and more time with clients. That means providing an all encompassing service offering, which includes -



A trusted, world class asset allocation team managing, implementing and caring for your clients' portfolios.



Regular, client communications delivered by us and branded you, on a weekly, monthly & quarterly basis.



Direct access to our Portfolio Management Team and opportunities to host 'Meet the Manager' seminars for your clients.



A flexible approach to Asset Allocation (DAA) allowing the ability to move capital in a timely manner and providing the liquidity for clients to access funds as they need during their financial journey.

# Why IMAs

Individually managed accounts (IMAs) allow clients to receive and participate in a tailored investment process based on their individual circumstances.

This results in a uniquely personalised experience, one that encourages a more engaging, intelligent and transparent investment conversation between advisers and their clients.

We know that each person's idea of wealth and happiness is different and their approach to investing will reflect that.

That's why we give you the opportunity to individually customise your clients' portfolios based on each of their preferences, values and goals.



## IMAs vs SMAs

Let's break down the similarities and differences

	SMA	IMA
Client beneficial ownership of assets	✓	✓
Tax efficiency	✓	✓
Portability of assets	✓	✓
Substitution of assets within the portfolio*	✗	✓
Ability to tailor to individual circumstances*	✗	✓
Incremental and individual implementation*	✗	✓
Transparency	✓	✓
24/7 real-time reporting	✓	✓
13 month suitability confirmation	✗	✓
Ability to treat new money different to old	✗	✓

\*SMAs may provide limited availability

For more information visit  
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