Individual dreams.
Individual goals.

Individually Managed Accounts

Creating engaging investment experiences.

Implemented Portfolios

Individually Managed Accounts

A more intelligent investment conversation

There has been a strong industry focus on Managed Accounts recently.

Whilst there is a school of thought that SMAs (separately managed accounts) are the next new thing, at Implemented Portfolios we argue that the mass customisation of the investment experience is the critical success factor.

Why?

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

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

One size rarely fits all

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.

After all, at the end of the day it's about helping your clients live the lives they've always dreamed of.

SMAs vs IMAs

A quick comparison

We understand that many of the managed account services on the market sound the same, so we've broken down some of the differences between SMAs and IMAs.

	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 & 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

Our IMA Service

At Implemented Portfolios, we pride ourselves on offering an exceptional IMA service that allows advisers to spend less time in their back office and more time with clients.

Other benefits include -

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

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

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

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 needed during their financial journey.

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