Praemium IMA

Made to measure managed accounts

The Praemium Individually Managed Account (IMA) enables advice businesses to construct portfolios that are more customised to their clients' specific needs and preferences from a broad universe of domestic and international managed portfolios (SMAs) and single investment assets.

Tailored portfolios designed by you

The Praemium IMA provides you with the investments and tools you need to deliver a portfolio as unique as your clients' needs.

In addition to building and blending an IMA portfolio using our broad universe of investment options, you can achieve further customisation with the use of our client investment preference tools which include the flexibility to lock, exclude and substitute specific investments for selected clients.

Broad investment & solution choice

In addition to more than 350 Separately Managed Account (SMA) model portfolios, (> 80 Investment Managers) you can design a blended or single investment asset portfolio, including the top 300 ASX listed securities, international listed securities, Exchange Traded Products (ETPs), XTBs, hybrids, unlisted managed funds and cash.

The Praemium IMA is available for the investment of superannuation/pension, SMSF or investment savings, enabling a tailored solution for all investments at any life stage.

Cost-effective for all clients great and small

With Praemium's competitively priced administration fees, low brokerage and low minimum investment requirement, you have a cost-effective solution for all your clients.

In addition, our approach to netting of trades across our SMA and IMA portfolios ensures your clients will continue to experience fee economies as their investment portfolios continue to grow.

Market-leading reporting

Praemium's unique integrated Managed Accounts platform can provide you and your clients with 24/7 access to our wide range of business and client reporting, offering full transparency across all investment holdings.

With Report Publisher you have control over what reports you present to your clients through their investor portal and what reports you prefer to deliver and discuss separately.

Single client view

The IMA forms part of Praemium's broader integrated Managed Accounts platform, covering custody and non-custody solutions. This means you can cater for all your clients on the one technology platform, with a consolidated view and the flexibility to tailor your portfolio approach to each individual client.

Praemium IMA

praemium

Your clients are unique. Give them an investment solution to match.

Praemium's integrated Managed Accounts platform offers a cost-effective tailored solution with a range of benefits for you and your clients.

Benefits for your clients

- Access to a broad universe of domestic and international single investment assets and domestic and international SMA model portfolios.
- Superannuation/pension, SMSF and investment and savings solutions.
- Beneficial ownership of investments and individual tax positions.
- Flexibility to exclude, hold or substitute assets to suit personal preferences.
- Comprehensive tailored reporting through a market-leading digital client portal.
- Value for money regardless of account balance, with very competitive administration fees and trading costs.

Benefits for your business

- A broad universe of single investment assets and SMA model portfolios supported by a sophisticated CGT what-if engine for assessing the impact of potential portfolio changes.
- Quick and easy client implementation with digital acceptance of applications and in-specie transfer of assets.
- High quality, custodial administration of all investments, corporate actions and individual tax positions.
- Access to our market-leading business and client reporting covering investments, tax, asset allocation and performance.
- A simple, intuitive and flexible platform that provides attractive managed account solutions for all your client segments.

T 1800 571 881 E support@praemium.com.au W www.praemium.com.