

# BT Panorama managed accounts

Portfolio management, your way.

BT Panorama offers a range of managed account solutions designed to help you efficiently establish and maintain client portfolios. Whether you want to offer your clients a managed portfolio from a professional investment manager or wish to construct your own portfolios – we offer the solutions and support you need, delivered through smart, intuitive and scalable technology.

## 1

### Maximise efficiencies

- Intuitive design and functionality streamlines portfolio construction, maintenance and rebalancing
- Save time on analysis and asset research by outsourcing to professional investment managers and consultants
- Portfolio changes and corporate actions can often be managed in bulk and with discretion, eliminating the need to produce advice documentation for ongoing portfolio management
- Implement consistent and timely changes across all client portfolios with ease, utilising BT Panorama's digital capability for non-discretionary ROAs and consent management where discretion is not available
- Orders are aggregated for consistent execution across clients and managed by institutional broker UBS

## 2

### Choose the solution that suits

- Utilise the portfolio construction solution that suits your business and your clients, including:
  - a wide selection of managed portfolios from specialist investment managers, across a range of different investment styles and asset classes
  - the ability to utilise your own in-house asset management capability or partner with your choice of asset consultant or investment manager to build your own tailored portfolio offer
  - portfolio construction and management tools, with full administration, custody and execution through BT Panorama to run your own MDA portfolios, or partner with an external MDA provider of your choice
  - non-discretionary adviser models that utilise BT Panorama's digital ROA and consent management tools

# 3

## Seamlessly integrated

- View your clients' managed accounts alongside their other investments – all in one place
- One screen to trade all investment types
- Easy access to key business and client information with tiered reporting at individual client, whole of client or business level

# 4

## Technology that works for you

- Scalable, investment grade technology supporting all aspects of portfolio establishment and maintenance with embedded compliance oversight and monitoring
- Key information available through intuitive dashboards and flexible, easy to read, real time reporting
  - See portfolio level valuations and performance or drill down to see underlying assets
  - Get the full picture with detailed realised and unrealised capital gains, asset allocation, income and transaction reports
- Support staff and accountant access to allow easy workflow management and collaboration

# 5

## Increased client engagement

- Full transparency means clients can see their portfolio holdings, transactions and fees, allowing clients to stay actively involved in their wealth and driving deeper client conversations
- The BT Panorama mobile app provides you and your clients 24-hour access, even when on the go
- Customise portfolios to suit your clients' own philosophical or ethical views by excluding or substituting assets within their portfolio
- Choose the tax methodology that drives the right outcome for clients

## For more information

[btpanorama.com.au/managed-accounts](https://btpanorama.com.au/managed-accounts) | 1300 784 207



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