

Praemium SMA

Proven expertise backed by sophisticated technology

Praemium's market-leading SMA technology provides you with a truly scalable solution, giving you more time to focus on your clients.

SMA market leader

Praemium has delivered complex taxation and performance reporting technology since 2001. We have long term, proven expertise and sophisticated technology that sets us apart from our peers. Using this same technology, Praemium pioneered the provision of SMA platform technology in Australia in 2005.

Since then our SMA has grown to over \$7 billion in FUA and is now one of the largest managed account providers in Australia.

Wide range of tailored reporting

Your advisory practice offers clients a unique experience and you want to be able to tailor your service proposition to suit different segments of clients. Praemium offers one of the largest libraries of customisable reports in the industry, covering investment advice, accounting and tax reporting.

Praemium's reporting options can even be branded to your company and tailored to provide the depth and type of information you require.

Superior customisation of models

With the Praemium SMA you are also able to tailor your standardised solution to the individual needs and goals of your clients. Not only are there hundreds of models to choose from, including international direct securities (or you can create your own), you can further customise portfolios using asset substitutions and trading locks.

Low trading costs

Praemium's SMA structure offers advisers and their clients significant cost savings in managing their portfolios. Trades are aggregated and netted daily across all models and assets, with costs (a maximum 0.055% incl GST) shared pro-rata between all investors participating in the trade, plus a settlement fee of only \$0.39 incl GST per transaction.

International options

Praemium has recently added several new international models to the SMA giving your clients the opportunity to combine domestic and global models within their portfolio. The benefit of investing in an International SMA is that your clients have transparency of holdings and direct ownership of global shares.

Enhanced client engagement

We can genuinely help you develop and enhance your client engagement model. With the support of Praemium's award-winning technology, you can offer a standardised portfolio solution in order to offer scalable advice.

Praemium technology offers the best of both worlds – managed accounts appropriate to all cross sections of your client base, combined with tools to tailor the experience to different client service levels.

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Praemium SMA

How managed accounts can enhance client engagement

What the Praemium SMA can do for your business



Enhance client engagement

- ✓ Spend more time with your clients and less time on administration
- ✓ Increase your client's engagement with their portfolio
- ✓ Offer a premium service to more of your clients
- ✓ Tailor portfolios for all of your clients
- ✓ Pass on reduced costs to your clients



Realise business benefits

- ✓ Reduce administration costs and compliance obligations
- ✓ Maintain control and increase transparency of outsourced portfolio construction
- ✓ Generate client referrals due to client awareness and confidence
- ✓ Increase business revenue and valuation
- ✓ Run and control your own models

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