



– Best interest: what role can  
Managed Accounts play?

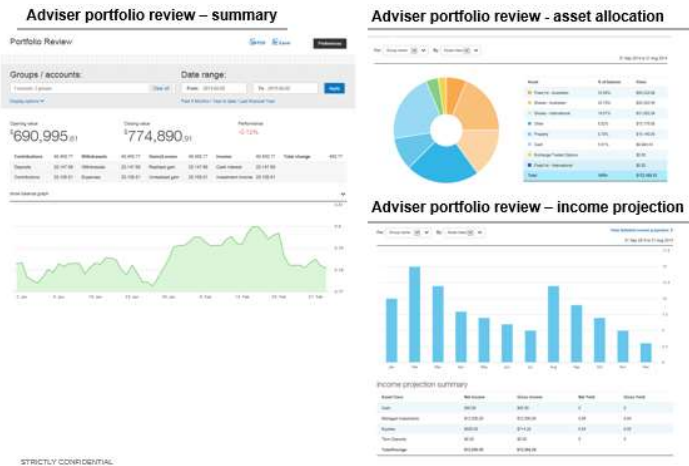
– Bianca de Melo Macquarie  
Sean Graham Assured Support

# Best Interest Duty (BID)



## Scenario

- \$775k in Super
- Partner has \$225k in Super
- 5 x Managed Funds
- 3 x ETFs
- 5 x Direct Australian Equities



## Client objectives

- Extensive travel – work & personal
- Want to know what I am invested in
- Consistency for me and my partner
- Don't want to pay unnecessary tax
- Have a think about my Will
- Revisit my Life Insurance & TPD

1

My adviser manages my portfolio for risk and return

2

I receive the right level of information about my progress

3

My adviser connects me to others as needed

**PERSONALISATION**

4

My adviser proactively manages my affairs

PERSONALISATION

5

My adviser helps  
improve my financial  
knowledge

