

We've heard from Advice practices



There are challenges faced when customising managed accounts

1



Tax implications of incumbency

2



Size threshold for a full tailored model

3



Need for time, resources and support

4



Customisation within a governance framework

new category of managed accounts



Off-the-shelf



Models with Tailoring

Tech Enabled
Scalable Customisation



**Private label
(bespoke)**

Combining
leading
capabilities to
serve your
practice and
clients

