



Infocus launches Managed Accounts solution

8 May 2015, Melbourne: Praemium Limited (ASX: PPS) is pleased to announce the launch of Infocus Wealth Management Ltd to our Separately Managed Account (SMA) investment platform, as outlined in the attached release

About Praemium: Praemium is a global leader in the provision of investment administration, Separately Managed Account (SMA) and financial planning technology platforms. Praemium administers in excess of 300,000 investor accounts covering approximately \$80 billion in funds globally, and currently provides services to approximately 700 financial institutions and intermediaries, including some of the world's largest financial institutions.

For further information contact: Mr Paul Gutteridge, Company Secretary +613 8622 1222

Infocus launches Managed Accounts

7 May 2015

Infocus Wealth Management Ltd today announced the launch of its Managed Accounts solution for advisers and their clients. The solution, delivered by market leader Praemium (ASX: PPS), adds to the group's existing managed funds model portfolio solution and provides a Separately Managed Accounts (SMA) platform with integrated reporting and tax optimisation functionality.

Infocus Managing Director Rod Bristow said "In response to demand from advisers across our Infocus and PATRON dealer groups, this week we released the Infocus Managed Accounts solution. This offers a completely automated SMA investment option for advisers and their clients. It's ideal for SMSF and high net worth clients seeking transparency, cost effectiveness and flexibility in investment management and reporting", he said.

"As a group, Infocus has had a similar solution in place for managed funds since 2007, when we launched the Infocus Invest core and satellite model portfolios. These are professionally researched and managed to allow for efficient administration and reporting for advisers and clients. Adding the Infocus Managed Accounts solution gives the same flexibility for advisers using an SMA investment structure", Bristow said.

Clients have access to complete multi-asset class portfolios appropriate to their risk profile as well as a range of single asset class portfolios. For advisers, in addition to efficient investment management, Infocus Managed Accounts has a range of automated reports available at the click of a button, for any date or range of dates. Reports include portfolio valuation, performance, transaction history, income, tax and more. Infocus Managed Accounts also automatically optimises tax outcomes for each investor and offers the functionality to minimise or maximise gains, manually select parcels, switch between methods and use a "what if" tool to assess the CGT impact of proposed transactions.

"For advisers in the Infocus group, we continue to deliver efficiency in investment management and reporting, whether clients are invested in managed funds or managed accounts. Client portfolios are always aligned and up to date – so advisers do not need to prepare advice documents when model portfolios change", Bristow said. "The Infocus Managed Accounts solution is consistent with our mission of helping advisers grow revenue, enhance efficiency and effectively manage risk in their business", he said.

Praemium Commercial Director Andrew Varlamos said Praemium is excited to be working with Infocus, a large, independent and progressive dealer group, and that the Infocus Managed Accounts solution is "further validation that managed accounts is becoming a mainstream solution, offering advisers and their clients a more efficient way to manage and connect with their investment portfolios".

Enquiries in relation to this media release can be directed to Rod Bristow, Managing Director Infocus Wealth Management, on 1300 463 628, or Andrew Varlamos, Commercial Director, Praemium, on 0423 275 802.

About Infocus Wealth Management Limited

Infocus is an independently-owned national wealth management group delivering financial advice, funds management and technology solutions.

The financial advice division includes an adviser network of around 180 Financial Advisers across two dealer groups, Infocus Securities and PATRON Financial Advice. Infocus and PATRON advisers are located in 115 practices across Queensland, New South Wales, ACT, Victoria, South Australia and Western Australia, providing financial planning advice to over 80,000 retail clients nationally. Group funds under advice are around \$4Bn and risk premiums under advice around \$70M.

The funds management division directly manages around \$300M via subsidiary Alpha Fund Managers. The technology division's focus is on delivering market-leading CRM, advice generation and practice management software, PlatformPlus, which has over 730 users nationally.

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