



News

PERFECT ENVIRONMENT FOR SMA GROWTH: BLACKROCK

By Milana Pokrajac on 29 September 2010 0 comments 0 tweet

Several factors are combining that will rapidly escalate the use of separately managed accounts (SMAs), according to BlackRock's co-head of customised portfolio service, James Langlands.

Langlands advised that heightened volatility and closure of some funds in the past two years has changed the attitudes of both advisers and investors.

"Future of financial advice reforms will prompt advisers and investors to look for lower cost solutions to either direct individual portfolios or wraps of managed funds," Langlands said.

According to the recently published research by Investment Trends, advisers are placing more clients in direct shares. The research house expects this trend to increase, suggesting new client investment in direct shares will rise from 14 per cent in 2009 to 26 per cent in 2013.

Langland added SMAs help avoid the issues that advisers encounter when advising on direct share investments, such as compliance risks and work involved in monitoring stocks.

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Paul Riser said:

Wow another group thinking that Accountants are going to be everything to all people.

BDM said:

Good luck attracting and retaining financial advisers Brendan. Whats that old saying..."you get what you pay for". Half eh, yeah, that...

Bill said:

This guy from chantwest obviously has no idea and is a dripfed. Obviously you don't open a SMSF to go into managed funds. As to having...

Alster Gould said:

As a advisor and accountant I am able to offer the benefits Warren has identified. Plus a reduced tax liability for the members because the...

Marty Sammon said:

Prescribing one solution to the issue of investing in managed invesment schemes is overlooking the many weaknesses inherent in setting up...

GB said:

The lengths they go to in an attempt to retain FUM and gain new inflows. Where are all these new financial planners coming...

Paul said:

What about an E-Super fund set up with the only fees being \$699 annual fee (including audit) and ATO lodgement fee of \$150. On a \$1000,000...

spell-check said:

As constantly mentioned in this industry: perceptions of impropriety are as damaging as the reality. The ongoing perception of the FPA, is...

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