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MORE THAN \$3 MILLION PER PLANNER STILL IN CASH

By Milana Pokrajac on 17 June 2011 0 comments

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Across an average planner's client base, there is about \$3.2 million sitting in cash that would have otherwise been invested in growth assets, but hasn't been due to market volatility, according to an [Investment Trends](#) survey.



The December 2010 *Adviser Product Needs Report*, which surveyed 778 planners, found more than half of clients are waiting for their financial adviser to give the green light for a safe return to the investment market.

Investment Trends investment analyst Recep Peker (pictured) said 60 per cent of advisers thought the main investment trigger was confidence that the economic recovery was real, but that one quarter had already begun investing.

"After the global financial crisis hit, a lot of clients wanted to pull out of the market because of negative sentiment, but one-third of planners tried to convince their clients to stay invested," Peker said.

Keeping clients invested in volatile times is often used by planners as a value add when dealing with their clients, but the survey also found portfolio construction and time-saving strategies made up the main part of their value proposition.

In fact, portfolio construction and administration efficacy get a mention with over 90 per cent of advisers.

"This constitutes helping them diversify their portfolio, choosing quality fund managers, portfolio administration and reporting – those are the most standard things planners mention to their clients," Peker said.

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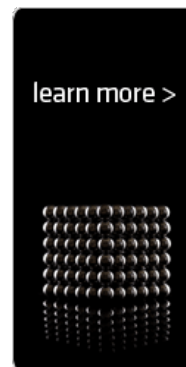


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