

# Managed accounts

## Built for what's next

### Why managed accounts?

Managed accounts can be used as a tool to help amplify your advice impact by ensuring your clients' investments remain aligned to their needs. This means you can streamline portfolio management to focus on what matters most: *nurturing client relationships*.

Now exceeding 60% adoption\* among advisers, managed accounts are fast becoming the default for new client funds – making up around two-thirds of core portfolio allocations\*.

**Why?** With automatic rebalancing and disciplined implementation rated among the most valuable benefits, managed accounts are helping advisers deliver consistent outcomes for clients – while also freeing up time to focus on strategy, guidance and long-term goals.



# A complete solution – for today and tomorrow

Whether your clients have simple or sophisticated needs, CFS Managed Accounts offer advisers a foundation for what's next. With **more than \$22 billion invested\*\*** across one of the broadest managed accounts menus in the market, CFS can help you simplify portfolio construction to deliver the depth, cost efficiency and flexibility you need to support clients.

## Built around the way advisers work

### 45+ investment partners

13+ portfolio consultants and 32+ portfolio managers supporting design, governance and ongoing implementation.

### 275+ managed portfolios

100+ Specialist portfolios on CFS FirstChoice and 180+ Signature portfolios on CFS Edge, spanning sector, diversified and global strategies.

### 3 ways to invest

1. Flagship
2. Badge
3. Tailored

- for all client needs



## A world of possibility

Give your clients access to global markets with international managed accounts.

### **Enhance diversification**

Gain exposure to a wider range of companies and sectors than is available in Australian markets.

### **Invest without complexity**

Cut through the complexities of international equity trading and foreign exchange.

### **Empower clients**

Engage clients to track performance of their ownership in global companies.

## A cost-efficient solution

Access lower platform admin fees with building blocks from the Accelerate Series.

### **Zero platform admin fees**

Low investment fees combined with zero admin fees, on Accelerate 100

### **Zero rebates**

Money is always invested and cash statements are clear.

### **Zero menu restrictions**

Combine with CFS Edge's full investment menu.

# Two powerful platforms

Your advice, your way – tap into the flexibility, scale and simplicity of CFS platforms.

## 1. CFS Edge

Personalise client outcomes and transform the way you do business with global access, lower admin fees and superior technology on CFS Edge.



### Reduce the cost of investing

Partner with well known Accelerate portfolio managers and benefit from reduced investment fees and discounted platform admin fees.



### Simplify diversification

Access domestic and international markets through a managed accounts structure.



### Personalise client outcomes

Combine managed account portfolio expertise with superior technology.

## 2. CFS FirstChoice

Lower the cost of advice and reduce admin time on CFS FirstChoice – a long-standing platform offering an efficient, cost-effective and transparent way to invest clients.



### Efficient

The flexibility of a managed account combined with the simplicity and efficiency of FirstChoice.



### Cost effective

Portfolios available on FirstChoice at no additional cost to you or your clients.



### Transparent

Clients can access comprehensive reporting via CFS secure portal and mobile app.



## Comprehensive expertise

Access well-known portfolio managers and deliver leading managed accounts solutions on our flagship CFS menus.

<b>By sector</b>	<b>By diversified</b>
<b><i>Australian equities</i></b>	Aequitas
Aequitas	Alpha
Atchison	Ascalon Capital
Atrium	Atchison
Ausbil	Atrium
DNR Capital	AZ Sestante
Elston	Betashares
Fidelity	BlackRock
First Sentier	CFS Investments
Lonsec Investment Solutions (LIS)	Drummond
UBS	Elston
<b><i>Australian fixed income</i></b>	Evidentia
Atchison	Human Financial
BondAdviser	Infinity
MST Financial	Innova
<b><i>International equities</i></b>	InvestSense
Atchison	Lonsec Investment Solutions (LIS)
Fidelity	Mercer
Franklin Templeton	MLC
Lazard	Morningstar
T. Rowe Price	Quillia
Walter Scott	Russell Investments
Watershed	Salita
<b><i>Property and infrastructure</i></b>	Watershed
Atchison	
CBRE	
ClearBridge	

Managers listed as at March 2026

## One trusted partner

Advisers have more than \$22 billion\*\* invested in managed accounts at CFS. With scalable solutions, curated investment menus and a commitment to what's next, we're here to help you grow – on your terms. Move forward with confidence and go further for your clients with CFS.



Scan to learn more or  
speak to a BDM at CFS

 [cfs.com.au/adviser](https://cfs.com.au/adviser)

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### Disclaimer

\*Investment Trends, Managed Accounts – 2026 \*\*as at December 2025

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