

Lonsec Managed Accounts

Platform minimum initial investment amount

Managed Portfolios	AMP MyNorth	BT Panorama	CFS FirstChoice	FinClear	HUB24	Macquarie Wrap	Netwealth	Praemium
Multi-Asset Managed Portfolios – Defensive	Not available	\$25,000	Not available	Not available	Not available	Not available	Not available	Not available
Multi-Asset Managed Portfolios – Conservative	Not available	\$25,000	Not available	Not available	Not available	\$25,000	Not available	Not available
Multi-Asset Managed Portfolio – Balanced	Not available	\$25,000	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available
Multi-Asset Managed Portfolio – Growth	Not available	\$25,000	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available
Multi-Asset Managed Portfolio – High Growth	Not available	\$25,000	Not available	Not available	NO MINIMUM	Not available	\$25,000	Not available
Listed Managed Portfolio – Conservative	Not available	Not available	Not available	Not available	NO MINIMUM	Not available	Not available	Not available
Listed Managed Portfolio – Balanced	Not available	\$25,000	Not available	NO MINIMUM	NO MINIMUM	\$100,000	\$50,000	NO MINIMUM
Listed Managed Portfolio – Growth	Not available	\$25,000	Not available	NO MINIMUM	NO MINIMUM	\$100,000	\$50,000	NO MINIMUM
Listed Managed Portfolio – High Growth	Not available	\$25,000	Not available	NO MINIMUM	NO MINIMUM	\$100,000	\$50,000	NO MINIMUM
Retirement Managed Portfolio – Conservative	\$500	\$25,000	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available
Retirement Managed Portfolio – Balanced	\$500	\$25,000	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available
Retirement Managed Portfolio – Growth	\$500	\$25,000	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available
Sustainable Managed Portfolio – Balanced	Not available	\$25,000	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available

Sustainable Managed Portfolio – Growth	Not available	\$25,000	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available
Sustainable Managed Portfolio – High Growth	Not available	\$25,000	Not available	Not available	NO MINIMUM	\$25,000	\$25,000	Not available
Lonsec (FirstChoice Managed Account Range: Defensive)	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available	Not available
Lonsec (FirstChoice Managed Account Range: Conservative)	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available	Not available
Lonsec (FirstChoice Managed Account Range: Moderate)	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available	Not available
Lonsec (FirstChoice Managed Account Range: Balanced)	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available	Not available
Lonsec (FirstChoice Managed Account Range: Growth)	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available	Not available
Lonsec (FirstChoice Managed Account Range: High Growth)	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available	Not available
SMA s	AMP MyNorth	BT Panorama	CFS FirstChoice	FinClear	HUB24	Macquarie Wrap	Netwealth	Praemium
SMA – Core	Not available	\$25,000	Not available	NO MINIMUM	NO MINIMUM	\$25,000	Not available	NO MINIMUM
SMA – Income	Not available	Not available	Not available	NO MINIMUM	NO MINIMUM	\$25,000	Not available	NO MINIMUM
Listed Managed Portfolio - Emerging Leaders	Not available	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available
Listed Managed Portfolio - Listed Income	Not available	Not available	Not available	NO MINIMUM	Not available	Not available	Not available	Not available

IMPORTANT NOTICE: This document is published by Lonsec Investment Solutions Pty Ltd ACN 608 837 583, a Corporate Authorised Representative (CAR 1236821) (LIS) of Lonsec Research Pty Ltd ABN 11 151 658 561 AFSL 421 445 (Lonsec Research). LIS creates the model portfolios it distributes using the investment research provided by Lonsec Research but LIS has not had any involvement in the investment research process for Lonsec Research. LIS and Lonsec Research are owned by Lonsec Holdings Pty Ltd ACN: 151 235 406. Please read the following before making any investment decision about any financial product mentioned in this document. **Disclaimer:** LIS provides this document for the exclusive use of its clients. It is not intended for use by a retail client or a member of the public and should not be used or relied upon by any other person. No representation, warranty or undertaking is given or made in relation to the accuracy or completeness of the information presented in this document, which is drawn from public information not verified by LIS. The information contained in this document is current as at the date of publication. Financial conclusions, ratings and advice are reasonably held at the time of publication but subject to change without notice. LIS assumes no obligation to update this document following publication. Except for any liability which cannot be excluded, LIS and Lonsec Research, their directors, officers, employees and agents disclaim all liability for any error or inaccuracy in, misstatement or omission from, this document or any loss or damage suffered by the reader or any other person as a consequence of relying upon it. Copyright © 2021 Lonsec Investment Solutions Pty Ltd ACN: 608 837 583 (LIS). This report may also contain third party supplied material that is subject to copyright. The same restrictions that apply to LIS copyrighted material, apply to such third party content.