

Managed accounts: Efficiency, scale, and the future of advice

By Perpetual Private Insights

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Perpetual Private CIO Kyle Lidbury speaks with Maja Garaca Djurdjevic from IFA about how managed accounts are transforming financial advice.

In a recent conversation with IFA, **Kyle Lidbury** shed light on the rapid growth and evolution of **managed accounts** - a model that is increasingly reshaping how financial advisers deliver investment solutions in today's complex and regulated environment.

Why managed accounts are growing

Managed accounts have become the fastest-growing part of the advice landscape, driven by:

- Rising regulatory and compliance demands,
- Increasing client demand for advice, and
- A shortage of advisers.

"Advisers' time is incredibly valuable," Kyle said. "Managed accounts free up that time so they can focus more on client relationships, not fund manager meetings."

Empowering advisers with flexible, high-conviction investment solutions

Far from replacing the adviser's role, managed accounts enhance it, allowing advisers to stay in control of investment decisions while leveraging institutional-grade research, execution, and portfolio oversight.

Perpetual Private's managed account suite is built specifically with this in mind. Our solutions include the [Direct Equities Responsible Investment Portfolio](#), which offers clients direct exposure to high-quality Australian companies selected with ESG considerations at the forefront. This portfolio empowers advisers to meet growing client demand for responsible and sustainable investing, without sacrificing the rigour of Perpetual's long-term investment philosophy.

For clients seeking diversified, outcome-oriented solutions, our [Growth and Income Opportunities Funds](#) are also available via managed accounts. These multi-asset strategies are designed to provide a diversified alternative asset solution, balancing capital growth with reliable income through changing market conditions and low correlation to traditional assets, such as equities and bonds.

"Clients want to know their money is being invested responsibly and effectively," Kyle said. "Our portfolios give advisers the confidence to meet those expectations with robust, transparent solutions."

Adoption and market potential

While over 50% of advice firms now use managed accounts, many do so on a limited scale. To unlock full efficiency, Kyle says firms should aim to move at least **70% of their client base** into these solutions.

The market is expected to grow from **\$200 billion to \$400 billion by 2030**, highlighting the long-term opportunity.

Business benefits

Practices that implement managed accounts effectively see strong commercial and client outcomes, including:

- More time with clients,
- Increased revenue per client,
- Higher Net Promoter Scores, and
- The ability to serve more clients.

"It's a win-win - better outcomes for clients and a more scalable, profitable business for advisers," Kyle explained.

Alternatives and the future

A key emerging trend is the integration of **alternative investments** into managed account portfolios. While these offer diversification benefits, Kyle cautions that they come with liquidity and disclosure challenges, particularly within wholesale structures.

Looking ahead, Kyle expects the next evolution will be driven by **technology and AI**, enabling greater **personalisation at scale**.

"This is the institutionalisation of independent advice," he said. "Advisers will increasingly access deep investment expertise while delivering tailored, client-centric solutions."

As the managed account model matures, it offers advisers greater efficiency, better client outcomes, and a scalable path to growth.

Take your first step - contact us 1800 631 381

If you're looking for an expert view on where to invest in 2025 and beyond, our experienced financial advisers and investment specialists would love to help you. Contact your Perpetual Private adviser, submit the form below or call us on 1800 631 381.

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