

# Managed Discretionary Accounts



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## Are You Financially Secure?

At Mulcahy & Co we are in a unique position to provide the expert advice and solutions of accounting, financial planning, lending, legal and information technology all under the one roof. This makes a normally complicated process seamless to help you on your way to becoming financially secure.

### WHAT DOES BEING FINANCIALLY SECURE MEAN?

It means assessing your personal and business goals and developing a plan to achieve them.

1. Goals & objectives
2. Estate plan
3. Risk plan
4. Asset protection plan
5. Taxation plan
6. Debt plan
7. Retirement plan
8. Business plan
9. Superannuation plan
10. Investment plan

### WHAT IS A MANAGED DISCRETIONARY ACCOUNT?

A managed discretionary account (MDA) is a service where a portfolio of investments is maintained for you and you provide discretion to an investment manager to make decisions on your behalf in your portfolio. In an MDA the individual delegates the day to day decision making of their investment portfolio. The MDA option allows a portfolio to be constructed in accordance with your own personal objectives, risk tolerance and asset preferences.

### WHY USE/BENEFITS OF AN MDA

- Using a managed account allows you to gain access to Mulcahy's investment management expertise alongside a range of external investment managers utilising a model portfolio approach.
- Eliminates the need to constantly obtain your agreement or instructions to sell, buy, apply for or redeem investments in financial products to provide an efficient service.
- Allows for daily monitoring and active management of your portfolio.
- Allows for an immediate response to changes in the market.
- Administration convenience and cost saving.
- Allows you to view portfolio transactions and reports at any time of your convenience.
- No exit fees are involved.



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