

# Evans and Partners Australian Equity Managed Discretionary Account

*"We believe that sustainable equity returns are ultimately derived from a company's ability to allocate its capital to the benefit of equity owners. Regardless of whether you are seeking growth or income, the portfolios will always aim to favour companies with a track record of optimal capital allocation, a focus on improving return on equity, a strong balance sheet and a transparent financial structure"*

**Mike Hawkins**  
Chief Investment Officer

The Evans and Partners Managed Discretionary Account (MDA) service provides a disciplined and structured approach for private investors seeking a balanced exposure to the Australian equity market. Based on the model portfolio overseen by our Research team, this service will be available to Evans and Partners clients who:

- May not want to actively manage their own portfolios but entrust the buying and selling decisions to our firm; or
- May wish to use the MDA as a core long term investment portfolio, allowing them and their adviser to focus on more strategic investment and asset allocation decisions.

Should you be conflicted due to your employment, restricted in your capacity to make prompt investment decisions or simply time poor, this service may reduce the time needed to monitor your investments. The portfolio will be actively managed by the Evans and Partners Investment Committee and includes comprehensive reporting and administration, thus removing the administrative burden associated with managing a portfolio.

The investments within the MDA service are held in your name, or your chosen legal entity, providing both beneficial and direct legal ownership of your investments.

**If you would like to know more please contact your adviser.**

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