Our discretionary investment management services

Our discretionary investment management services remove many of the difficulties that come with investing. With both our Managed Portfolio Service (MPS) and our tailored portfolio service, your dedicated Investment Manager will build and run an investment portfolio for you – saving you the stress of managing it yourself.

They'll make any necessary adjustments for you without having to ask for your permission each time. As a result, your portfolio will remain responsive to market opportunities from across the world.

Regardless of which service you choose, our goal is to deliver you attractive, risk-adjusted returns that aim to grow the real inflation-adjusted value of your portfolio.

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Why choose us?

Made for you

Your portfolio is driven by your unique risk preferences and needs. We will always put your requirements first, rather than chasing short-term returns.

In-depth research

Benefit from our global investment ideas and research, conducted by 75+ in-house investment researchers and analysts.

Active management

Your portfolio is actively managed and monitored, to help maximise your returns and minimise losses.

Stay supported

Feel confident that your portfolio is being managed by an accessible and dedicated Canaccord Wealth team.

Proven performance

Our model portfolios are built for long-term success, with a strong track record of delivering consistent, risk-adjusted returns across market cycles.

Choosing between managed and tailored portfolio management

Both services provide discretionary portfolio management. The key difference between them is the level of control and flexibility you'll have.

Managed Portfolio Service (MPS): If your investment needs are relatively straightforward, our MPS is a more cost-effective way to access our discretionary investment expertise. You can choose from a range of actively managed, risk-rated, multi-asset portfolios as well as one dedicated fixed interest portfolio.

Tailored portfolio management: Our tailored portfolio management service is a good choice if you need a more individual service. For example, if you have more complex needs, larger sums to invest, or simply want more flexibility.

With a tailored portfolio, your Investment Manager has more freedom to adjust the asset allocation within your portfolio. They can also invest in a wider range of assets and currencies than our MPS. However, this extra element of personalisation means that tailored portfolio management comes at a slightly higher cost.

	MPS	Tailored portfolio management
Discretionary	Yes	Yes
Asset allocation	Fixed by our Chief Investment Office	Led by our Chief Investment Office More flexible
Type of asset	Equities, bonds and/or alternatives all invested in via investment funds or exchange-traded funds (ETFs)	Equities, bonds and/or investment funds or ETFs, individual stocks and equities, investment trusts
Subject to VAT in the UK	No	Yes
Dedicated Investment Manager	No	Yes

We'd be happy to provide more information about these services, which you can request through your financial adviser. You can also learn more on our website: canaccord-wealth.com

Important information

Investment involves risk. The value of investments and the income from them can go down as well as up and investors may not get back the amount originally invested. The investments described in this document may not be suitable for all investors.

Investors should make their own investment decisions based upon their own financial objectives and financial resources and, if in any doubt, should seek advice from an investment adviser.

Any tax benefits depend upon the investor's individual circumstances and clients should discuss their financial arrangements with their own tax adviser before investing. The levels and bases of taxation may be subject to change in the future.

This document is for information only and is not to be construed as a solicitation or an offer to purchase or sell investments or related financial instruments. This has no regard for the specific investment objectives, financial situation or needs of any specific investor.

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