

At a glance - our adviser solutions



Why advisers work with us

- Platform and tailored solutions to complement your centralised investment proposition (CIP)
- Specialist services for more complex client needs
- Regular investment updates, market commentary and Chief Investment Office (CIO) access.

Core investment solutions

Personalised portfolios



Tailored investment management

Individually managed portfolios built around each client's objectives, circumstances, investment preferences and attitude to risk.



US service

US-compliant portfolio management for clients with US tax-reporting requirements, available through platform models or tailored portfolio management.



Cash alternative

Gilt Portfolio Service

A portfolio of UK short-dated gilts designed to target a competitive return as a low-risk alternative to cash deposits.

Managed portfolios



MPS on platform

Multi-asset accumulation, income and fixed income portfolios designed to provide attractive risk-adjusted returns.



Flexible OEIC structure

Funds that use the same investment process and asset allocation expertise as our MPS portfolios, giving advisers the flexibility of an OEIC structure to support CIP delivery.

Personalised and managed portfolios



Sustainable investing

Multi-asset portfolios focused on companies where innovation can help solve sustainability problems.



Scan for adviser resources

Investment solutions for financial advisers,
service information and follow-up resources.

Additional services to support you and your clients

Alongside our core investment solutions, you can draw on specialist expertise to support clients with more complex needs and grow your business.



Specialist and complex client needs

Court of Protection / personal injury / trusts / Family Investment Companies

Specialist investment managers with experience supporting advisers and clients where circumstances, structure or decision-making requirements are more complex.



Existing portfolios

Portfolio review service

Analysis and investment commentary for existing client portfolios as part of a wider CIP review.



Inheritance tax

IHT Portfolio Service

A specialist AIM-based strategy dedicated to potentially reducing clients' inheritance tax liability, available on platform and via direct custody.



Market insight

Regular investment updates and CIO access

Regular contact from our CIO and your client's Investment Manager, plus events on market trends and investment commentary.



Borrowing

Portfolio lending

A specialist lending service that may allow eligible clients to borrow up to 50% loan-to-value against investment portfolios, without selling assets.



Practice growth

Adviser business consultancy

Access to an in-house performance consultant to support business growth, adviser and senior management training.

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.

Any tax benefits depend on your clients' circumstances, and they should discuss their financial arrangements with you 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.

Specific risks of the IHT Portfolio Service investing in AIM-listed companies include the potential volatility and illiquidity associated with smaller capitalisation companies. There may be a wide spread between buying and selling prices for AIM-listed shares. If an investor has to sell these shares immediately they may not get back the full amount invested, due to the wide spread. AIM rules are less demanding than those of the official list of the London Stock Exchange, and companies listed on AIM carry a greater risk than a company with a full listing. The current inheritance tax rules and tax treatment of AIM shares may change in the future. In addition, investors must be prepared to hold their shares in AIM-listed companies for a minimum of two years or these assets will be considered part of their estate in the IHT calculation.

This document is for professional advisers only and is not for onward distribution to private clients.