

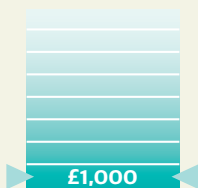
International intermediaries

Rathbones
Look forward

Multi-asset portfolio service

For use by
financial advisers only
Unsuitable for use
by private investors

Minimum investment*



Availability

Through various
life and fund
platforms

Provider

Rathbone
Unit Trust
Management Ltd

Our multi-asset portfolio service provides your clients with access to our extensive investment resources. There are three UCITS V funds in the range, which are available in GBP, EUR and USD (EUR and USD share classes are hedged).

They are ideal for investors who want a multi-asset investment approach to meet their financial objectives within a defined level of risk.

Rathbones and your clients

Our multi-asset portfolio service is a unitised wealth management solution:

- a choice of three funds to suit investors with different objectives and appetites for risk.
- an unconstrained investment universe including individual securities and funds across both traditional and alternative asset classes, as well as investments that can offer portfolio insurance.
- managed by investment professionals with experience at preserving and growing wealth over the long term.
- online monthly factsheets, quarterly investment reports and investment commentary, which include detailed information about the underlying holdings, asset allocation and performance.
- low minimum investment levels and super institutional charging terms are available through a range of platforms.

Rathbones and your business

We designed our multi-asset portfolio service to align with your business:

- actively managed strategies that allow you to retain control of your client relationships without having to spend time on day-to-day investment decisions.
- you work with your clients to discuss their financial objectives and complete a risk assessment, before selecting the most appropriate funds.
- we provide the detailed information you need to keep your clients informed about investment performance.
- in line with your responsibility to maintain suitability, your clients can switch between funds quickly and easily if their situation or objectives change.

For more information, contact your Rathbones investment director or call our international business development team on +44 (0)20 7399 0800 or email international@rathbones.com or for more information, please visit rathbones.com

*Alternative currency minimum investment €2,000 or \$2,000

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Look forward

 [rathbones.com](https://www.rathbones.com)

 Rathbone Brothers Plc

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INT-MAP-08-17