

International intermediaries

Rathbones
Look forward

Unitised
portfolio service

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

**Minimum
investment**



Availability

Directly through
the Rathbone
investment desk
and a wide range
of external
product wrappers

Provider

Rathbone
Investment
Management Ltd

Our unitised portfolio service can offer your clients a detailed and personal level of attention that you would typically receive from a discretionary portfolio. There are six strategies in the range, which invest in the Rathbone multi-asset portfolios.

They are ideal for clients who like to engage with the investment process but leave the decisions to a team of professional investors.

Rathbones and your clients

Our unitised portfolio service is a simplified wealth management solution:

- a high standard of service that includes direct access to a dedicated private client investment manager. No call centres or automated telephone systems.
- online valuations including detailed information about the underlying holdings, asset allocation, investment strategy and performance.
- access to Rathbones' intellectual capital, including publications about the world economy and financial markets as well as broader issues related to investment.
- with six strategies in the range, our unitised portfolio service is appropriate for many different financial situations and objectives including before and after retirement.
- managed by investment professionals with experience at preserving and growing wealth over the long term.

Rathbones and your business

We designed our unitised portfolio service to align with your business:

- actively managed funds 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. Our investment managers then provide an additional layer of suitability by matching them to an appropriate strategy or combination of strategies.
- we provide the detailed information you need to keep your clients informed as well as manage broader financial planning issues.
- working together, we review your clients' objectives to ensure they remain invested in the most appropriate funds.

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

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 rathbones.com

 Rathbone Brothers Plc

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