

Blackfinch Tailored Portfolio Service (TPS)

Reasons Why

Direct access to the investment management team



At Blackfinch, we value the relationship between adviser and investment manager and place emphasis on working closely together. With the Blackfinch TPS service, you have direct access to the asset management investment team. Whether it is to discuss evolving market conditions or to support your client conversations during periods of volatility, we maintain a transparent and responsive relationship. This open and direct channel remains a key differentiator of the TPS offering.

A Consumer Duty focus



We recognise the responsibilities placed on advisers to ensure their proposition meets the changing needs of the regulatory landscape. We support you in maintaining a compliant and confident investment proposition, which includes:

- Actively seeking ways to reduce the complexity of multiple investment offerings. In turn this helps to reduce time constraints, business risk and alignment with indemnity cover.
- Your TPS portfolios are built from the ground up, with your investment objectives and cost caps in mind. This provides you with an initial value assessment that continues to be monitored on an ongoing basis after launch.
- On a quarterly basis, your investment committee meet to discuss and document the TPS portfolios, meeting ongoing FCA due diligence requirements and consistent value creation.

Access to the wider Blackfinch Group specialist investment teams



Our heritage dates back over 30 years, with the official launch of Blackfinch Investments in 2012. In the years that followed, our growth saw expansion into asset management, renewable energy, property and ventures. We continue to adapt and evolve into markets where there is an opportunity to help us all thrive.

Our TPS adviser community has access to these specialist investment teams who bring sector expertise, market insight and experience that can help inform decisions around portfolio construction. This could take the form of one-on-one consultations with our investment specialists, CPD-qualifying events to upskill knowledge, or other formats tailored to your needs.

Tailored pricing to meet your cost requirements



Not every client fits the same model—and your pricing shouldn't either. In today's shifting landscape, we see many chasing the lowest cost. We call this 'the race to the bottom' and we don't believe that's the answer.

With TPS, you can tailor pricing to suit your approach, blending active and passive strategies. It's flexible enough to match any price point, helping you build investment models aligned to both style and risk.

Proactive, direct input into your asset allocation – including tactical overlay



We believe advisers' insight to be invaluable throughout the TPS relationship, and your input is always encouraged. The ongoing investment committee is a great forum to share feedback, investment ideas, and help shape your portfolios.

Recent examples include advisers bringing feedback on the role of gold in a portfolio due to it being a perceived 'safe haven' asset. We value this input at Blackfinch, whereas some firms may be wedded to their own investment process and buy list, not allowing for adviser feedback and flexibility.

Content creation to fully enhance your client's journey



We believe in empowering advisers and their clients to understand the investment universe. We focus on creating content that's educational, informative, and written in plain English so that advisers can comfortably use them with their clients.

We actively encourage advisers to send content requests, listening carefully to what would add the most value. Examples include jargon-friendly workshops, 'ask the manager' events or Q&A sessions. These are great platforms for advisers to invite their valued clients to meet the team and ask questions about their portfolio. We believe this remains a unique approach amongst the market.

Client-friendly literature and communications



We understand the importance of being able to engage effectively with your client. To help, Blackfinch creates a comprehensive range of literature for your TPS Portfolios, including:

- Client-facing brochures
- Monthly factsheets
- Quarterly investment reports
- Ad-hoc market commentaries
- A 'potential range of returns' document
- Client-facing presentations, and internal training presentations; and
- Communications are tailored in line with your brand values and logos, where required.

All content is created to support your meaningful client conversations and reinforce your professional offering.

Mapped to your chosen risk profiler and investment requirements



Blackfinch has a strong track record in building and managing multi-asset investment portfolios. Since the inception of our MPS service, our portfolios have never breached the boundaries set by our risk-rating partners. This consistency and expertise will be applied when constructing your portfolios, keeping them mapped to your requirements.

Our approach offers flexibility for advisers seeking to balance tailored client journeys with the frameworks of risk profiling tools. Whether your preference is for passive, active, or blended strategies, we can construct portfolios around your objectives.



Adviser Support



We understand that advisers need greater support during periods of heightened market activity and investor concern. We are available to join your client meetings, providing clear, expert commentary on macroeconomic themes and portfolio decisions. Our TPS adviser community consistently values the reassurance and clarity these interactions provide.

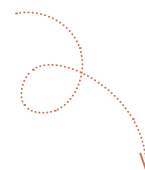
Rebalancing



Advisers are looking for more control within their CIP and chosen investment partnership. We believe that rebalancing should be based on value, not calendars. Unlike some providers who automatically rebalance on fixed dates, we act when it matters most. Rebalancing within TPS takes place based on market signals, fund performance, or portfolio changes. This approach offers greater flexibility, helping you deliver more strategic, long-term outcomes for your clients.

No two adviser firms are the same and neither are our solutions.

If your investors are considering diversifying their portfolio across both geographies and asset classes, then speak to one of our team today about Blackfinch Asset Management.



Mark Keogh

Head of Asset Management

m.keogh@blackfinch.com



Jordan Kent

Distribution & Sales Executive

j.kent@blackfinch.com



Josh Clayton

Product Specialist

j.clayton@blackfinch.com

IMPORTANT INFORMATION

Capital at Risk. Blackfinch Asset Management Limited is an Appointed Representative of Blackfinch Investments Limited which is authorised and regulated by the Financial Conduct Authority. Registered address: 1350–1360 Montpellier Court, Gloucester Business Park, Gloucester, GL3 4AH. Registered in England and Wales company number 11639647. The Blackfinch Asset Management Portfolios are actively managed by Blackfinch Investments Limited. Blackfinch Asset Management Limited act as the promoter and distributor of the model portfolios. All information correct as at July 2025.