BLACKFINCH
WEALTH

MANAGED PORTFOLIO SERVICE

The Blackfinch Wealth Managed Portfolio Service (MPS) provides our partner firms with access to a range of carefully constructed, independently risk-rated investment portfolios. The portfolios are actively managed, multi-asset focused and globally diversified. They aim to deliver inflation linked targeted returns over a defined time period whilst also focusing on the optimum balance between risk and reward.

Through the MPS, we are dedicated to helping you focus on the growth of your business via a range of tools and services that can enhance the overall client experience. Read our **REASONS TO PARTNER** document to find out more about our unique approach to working with financial advisers.

PORTFOLIO FEATURES

Portfolio	Target Return (over a rolling 5 yr period)	Risk Ratings	
Defensive	CPI + 1%	defaqto Risk Rating 3 Very Low Risk	Dynamic Planner Profiled 3
Cautious	CPI + 2%	defaqto Risk Rating 4 Low Risk	Dynamic Planner Profiled 4
Balanced	CPI + 3%	defaqto Risk Rating 5 Low to Medium Risk	Dynamic Planner Profiled 5
Growth	CPI + 4%	defaqto Risk Rating 6 Medium Risk	Dynamic Planner Profiled 6
Enhanced Growth	CPI + 5%	defaqto Risk Rating 7 Medium to High Risk	Dynamic Planner Profiled 7

PLATFORM AVAILABILITY

AEGON
ascentric
AVIVA
embark platform
Hubwise YOUR PLATFORM SOLUTION
novia
Standard Life
transact take control
ZURICH

ACCESS

No minimum or maximum amounts specified for investment in the MPS

Underlying investments trade on a daily basis meaning investors can access their capital at any time

POTENTIAL CLIENTS

The MPS is appropriate for clients looking to gain exposure to global investment markets

The MPS can be used as a sole investment solution or as part of a wider strategy for clients

ADVISER BENEFITS

— **Client ownership:** You retain ownership and control over client relationships

— **Risk reduction:** Comprehensive screening and investment selection process

— **Helping deliver your plan:** Our target investment returns measured by inflation help with cash flow forecasting

— **Simplicity and accessibility:** Portfolios are accessed via third-party platform providers

— **Placing advisers front and centre:** Option of co-branding or white labelling MPS literature in line with your company's branding

CLIENT BENEFITS

— **Active portfolio management:** Daily monitoring of investments to capture upside potential and protect capital in downturns

— **Clear investment objectives:** Targeting a range of returns above inflation, relevant and understandable to the end investor

— **Risk management:** Through investment into regulated, globally diversified, multi-asset, investments

— **Wide-ranging availability:** Can be held within a range of tax-efficient wrappers as well as GIAs

— **Investment expertise:** Specialists with over 100 years of combined industry experience