

# REASONS TO PARTNER...

## OUR AMBITION

To work with advisers to build a proposition addressing their modern-day requirements.

### Our aims:

- To emphasise the importance of the adviser's role and reiterate their place in the advice process
- To enhance investor's understanding of what their portfolio is aiming to achieve, and what they can expect from their investment journey
- To measure performance in a way that is transparent, straightforward and relevant
- To offer a unique range of tools and collateral designed to assist in the advice process

## OUR APPROACH

We understand that advisers face a multitude of challenges and require services that meet client aims as well as fulfilling their own business and regulatory needs.

### Key features of the portfolios are:

- **Simplicity:** Five investment portfolios with clear objectives
- **Accessibility:** No minimum or maximum investment levels
- **Independent oversight:** Portfolios risk rated by Dynamic Planner and Defaqto
- **Exclusivity:** Only available through a select number of financial advisers and not available directly to end investors
- **Collaboration:** We co-brand all literature with each of our partner firms
- **Independent ownership:** An unbiased, whole-of-market approach to portfolio management

## YOUR BUSINESS

Our approach is a key differentiator in today's marketplace. The Blackfinch Wealth Managed Portfolio Service (MPS) is designed to enhance the client-adviser relationship by being a true investment partner.

### The partnership includes:

- **Consultation:** In-depth initial consultation to ensure we will be the right fit for you
- **Flexibility:** Ability to tailor parts of the service to suit your individual business needs
- **Reporting:** Co-branded or white-labelled literature
- **Events:** Jointly hosted events with your firm to aid business growth and client interaction
- **Communication:** Active engagement and direct communication between you and the MPS portfolio managers

For more information about the Blackfinch Wealth partnership, please contact your usual account executive or visit [blackfinch.com/wealth](https://blackfinch.com/wealth).