

Multi-asset portfolio service

For professional advisers only

Minimum investment



Availability

Through all the main fund platforms including Aviva Wrap, Ascentric, Axa Elevate, Cofunds, Nexus Funds, Novia, Nucleus and Transact

Provider

Rathbone Unit Trust Management Ltd

Our multi-asset portfolio service

provides your clients with access to our extensive investment resources. There are four funds in the range, which invest in a broad universe of global opportunities.

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 four 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 experienced investment professionals with a proven track record of multi-asset class investing to preserve and grow wealth over the long term.
- online valuations and investment commentary including 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.

To set up a meeting, please get in touch with our intermediary services desk on **020 7399 0399** or email ifaservices@rathbones.com or for more information, please visit [rathbones.com/financial-advisers](https://www.rathbones.com/financial-advisers)

Rathbones

Look forward

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