

Unitised portfolio service

For professional advisers only

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 four strategies in the range, which invest in the 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 money.
- with four funds in the range, our unitised portfolio service is appropriate for many different financial situations and objectives including before and after retirement.
- managed by experienced investment professionals with a proven track record of preserving and growing wealth over the long term.
- low minimum investment levels, a transparent charging structure and is available through ISAs, SIPPs and offshore bonds.

Rathbones and your business

We designed our unitised 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. 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, including annual tax returns.
- working together, we review your clients' objectives to ensure they remain invested in the most appropriate strategies.

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

 rathbones.com/financial-advisers

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 [Rathbone Brothers Plc](#)

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