Individual portfolio service

For use by financial advisers only

Unsuitable for use by private investors

Minimum investment	Availability	Provider
£100,000	Directly through the Rathbone investment desk and a wide range of external product wrappers	Rathbone Investment Management Ltd

The individual portfolio service offers a detailed and personal level of attention as well as access to our extensive investment resources for clients with larger sums to invest.

This service is ideal for individuals and families with financial arrangements who require a tailored approach to their investment.

Rathbones and your clients

Our portfolio service is a comprehensive wealth management solution:

- a high standard of service that includes direct access to a dedicated private client investment manager who is responsible for managing portfolios and meeting the broader needs that form part of the relationship.
- full flexibility to tailor the investment strategy to meet individual preferences and restrictions, such as avoiding any concentration of existing assets as well as accommodating any ethical investment preferences.
- an emphasis on investing in direct securities provides increased control and transparency within the investment strategy as well as helping to reduce the costs associated with investing.
- detailed information about underlying holdings, asset allocation, investment strategy and performance, as well as customised reports and the ability to change the frequency of reporting.
- access to Rathbones' intellectual capital, including publications about the world economy and financial markets, and broader issues related to investment, as well as invites to seminars and events.
- managed by experienced investment professionals with a proven track record of preserving and growing wealth over the long term and meeting individual needs.

Rathbones and your business

We designed our individual portfolio service to align with your business:

- a joined-up approach to providing investment management services where we work with you to ensure individual requirements are met. As a result, clients benefit from two professionals working closely together to meet their needs and communicate with them regularly.
- you form a trusted partnership with a discretionary manager that removes your own responsibility for the underlying investments, leaving you free to monitor how the portfolio meets your clients' needs.
- the ongoing suitability of the portfolio remain the responsibility of the Rathbone investment manager, allowing you to focus on due diligence and the suitability of Rathbones as a provider of investment management services to your clients.
- we provide the detailed information you need to keep your clients informed as well as manage broader financial planning issues. This includes monitoring and managing capital gains tax and other allowances with you to ensure your clients' tax positions remain in line with your advice.

For more information, contact your Rathbones investment director or call our international business development team on 020 7399 0800 or email ifaservices@rathbones.com or for more information, please visit rathbones.com/financial-advisers

Rathbones
Look forward

rathbones.com/financial-advisers
@Rathbones1742
Rathbone Brothers Plc

Our UK offices

Aberdeen	Cambridge	Exeter	Liverpool	Newcastle
Birmingham	Chichester	Glasgow	London (head office)	Winchester
Bristol	Edinburgh	Kendal	Lymington	

Important information

IFA-IPS-04-17