

For use by  
Financial Advisers  
Unsuitable for use  
by private investors

## Managed portfolio service

Rathbones  
Look forward

### Minimum investment



### Availability

Exclusively through Rathbone Investment Management Ltd

### Provider

Rathbone Investment Management Ltd

Our managed portfolio service is offered by Rathbone Investment Management and invests exclusively in the range of Rathbones multi-asset portfolio funds (the 'RMAP' funds) managed by Rathbone Unit Trust Management Limited (a subsidiary of Rathbone Brothers Plc). An execution-only service which offers your clients access to unconstrained active management by highly experienced fund managers, supported by our proprietary investment process and research team. There are six strategies in the range, targeting capital growth or income.\*

Our service is ideal for clients who do not need a discretionary service but want access to an investment offering investing in funds with a proven track record of success coupled with efficient and responsive administration.

## Taking our managed portfolio service to a new level

- active daily investing enabling the managers to take full advantage of market opportunities
- delivered at a competitive price minimising the headwinds to performance
- named fund managers with a public track record who are personally accountable for investment performance
- meaningful investment objectives – cash or inflation plus – which clients can relate to and measure
- risk targets ensuring investment managers have a focus on protecting wealth, as well as generating real returns, should mean fewer surprises or unhappy clients so you can focus on your business
- look through reporting giving full transparency to underlying holdings so clients experience the 'look and feel' of a bespoke portfolio
- a tax year-end pack to help clients complete their self assessments, saving time and potentially accountancy costs
- supported by a dedicated service team providing quick responses to your enquiries.

For more information, please contact our intermediary services desk on 020 7399 0399, email [ifaservices@rathbones.com](mailto:ifaservices@rathbones.com) or for more information, please visit [rathbones.com/financial-advisers](http://rathbones.com/financial-advisers)

\*A tax liability may be incurred if switches are made between funds or strategies and in the event of rebalancing the Balanced and Equity strategies.

**Rathbones**  
Look forward

 [rathbones.com/financial-advisers](https://rathbones.com/financial-advisers)

 @Rathbones1742

 Rathbone Brothers Plc

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