

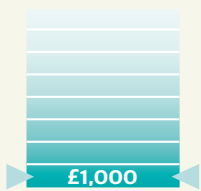


Rathbones
Look forward

Multi-asset portfolio service

For use by financial
advisers only
Unsuitable for use
by private investors

Minimum investment



Availability

Through all main
fund platforms

Provider

Rathbone
Investment
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 assets 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](tel:02073990399), 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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