Investment SOLUTIONS

Your recommendation,
built on strong foundations.

evelyn PARTNERS

for ADVISERS

Welcome

At Evelyn Partners, our primary objective is to provide you with an investment solution that complements the service you already deliver to your clients. We respect the integral role that you have as their adviser and appreciate that investment management represents one part of the financial plan you create. By working in partnership, we can help you provide your clients with a truly enhanced investment management service.

Outsourcing your clients' investment management requirements can give you more time to focus on their strategic financial planning.

Backed by our investment expertise, we provide access to a number of portfolio services – saving you the time, resources and costs of doing it yourself.

Visit www.evelyn.com/uk-ifas to speak to our business development team.

Investment SOLUTIONS *for* ADVISERS

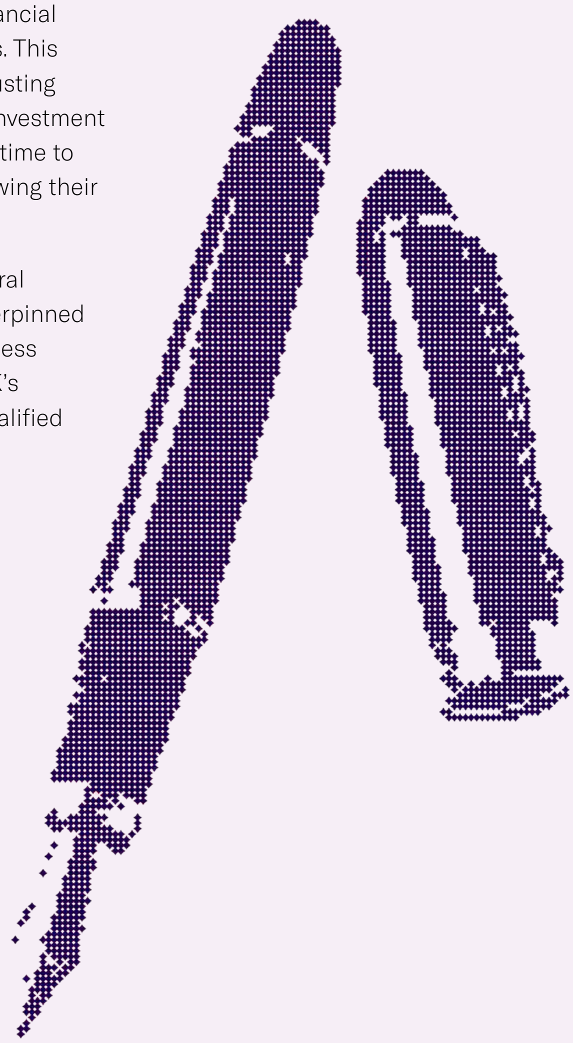
Key RISKS

The value of investments, and the income derived from them, can go down as well as up and you can get back less than you originally invested.

There can be no assurance that any portfolio will achieve its return objective. The return objective shown is neither guaranteed nor binding on the manager.

The regulatory introductions of MiFID II, PROD and Consumer Duty have all added to the reporting burden that advisers face when managing clients' financial planning needs and investments. This has led to many adviser firms trusting Evelyn Partners to manage the investment responsibility, giving them more time to spend with their clients and growing their business.

At Evelyn Partners we have several investment solutions, each underpinned by a disciplined investment process and delivered by some of the UK's most experienced and highly qualified investment professionals.



CORE *Managed Portfolio Service*

Active asset allocation with predominantly active underlying exposure

"A BLENDED APPROACH *providing active asset allocation and predominantly active underlying fund exposure.*"

– James Burns, Lead Portfolio Manager

Our Core Managed Portfolio Service (MPS) is actively managed and constructed using a blend of open-ended funds and passives. Core MPS has no fixed rebalancing dates, allowing our portfolio managers to amend asset and country weightings as and when their views on markets and sectors opportunities evolve.

The use of alternative investments is a key pillar of the proposition as it enhances diversification and can help reduce volatility. The Core MPS combines cost efficiency with disciplined oversight, underpinned by Evelyn Partners' long-established asset allocation process.

Investors can choose from nine risk-rated portfolios, including seven growth models and two income-focused strategies, each aligned to clear risk profiles and long-term objectives. Launched in June 2011, the Core MPS benefits from a long-term performance track record.

The Core MPS can be accessed through tax-efficient wrappers such as individual savings accounts (ISAs) and self-invested personal pensions (SIPPs).

Who this solution may suit
Clients in later life stages, for whom managing downside risk and reducing volatility are key considerations.

Fast FACTS

- ✓ Actively managed multi-asset approach
- ✓ Use of alternatives to enhance diversification
- ✓ Over 10 years' performance track record
- ✓ 9 available models, including 2 income strategies
- ✓ Risk mapped by Defaqto, Dynamic Planner, EValue, Oxford Risk & Synaptics
- ✓ Available direct via Evelyn Partners, or via 7IM, Aberdeen Wrap & Elevate, Aegon, Aviva, AJ Bell, Fidelity Adviser Solutions, Fundment, FusionWealth, Hubwise, M&G Wealth, Morningstar Wealth Platform, Nucleus, Quilter, Scottish Widows, Transact and Wealthtime

ACTIVE *Managed Portfolio Service*

Maximum flexibility through active asset allocation and the use of investment companies

"INVESTMENT COMPANIES *have been my* PASSION *for over 25 years.*"

– James Burns, Lead Portfolio Manager

Our Active MPS is actively managed and constructed using a unique blend of investment tools including investment companies, open ended funds, and passives (ETFs and tracker funds). It is our most flexible and sophisticated MPS range, benefitting from our investment companies' expertise which provides an additional tool not usually found in the majority of MPS services. Active MPS has no fixed rebalancing dates, allowing our portfolio managers to amend asset and country weightings as and when their views on markets and sectors opportunities evolve.

Investors can choose from six risk-rated portfolios designed to meet a range of client objectives and risk profiles. Launched in September 2012, Active MPS benefits from over 10 years' performance track record.

The Active MPS can be accessed through tax-efficient wrappers such as ISAs and self-invested personal pensions (SIPPs).

Who this solution may suit
People seeking a differentiated approach, where the use of investment companies provides access to opportunities not typically available within traditional MPS solutions.

Fast FACTS

- ✓ Actively managed multi-asset approach
- ✓ Use of investment companies to enhance diversification
- ✓ Over 10 years' performance track record
- ✓ 6 available models
- ✓ Risk mapped by Defaqto, Dynamic Planner, EValue, FinaMetrica, Oxford Risk and Synaptics
- ✓ Available via 7IM, Aberdeen Wrap, Aviva, Fundment, M&G Wealth, Quilter, Transact and Wealthtime

INDEX *Managed Portfolio Service*

Active portfolio management, using a full suite of passive instruments

"Benefit from LOW-COST ACCESS *to our asset allocation* EXPERTISE."

– Dan Caps, Lead Portfolio Manager

Our Index Managed Portfolio Service (MPS) is actively managed and constructed using a range of passive funds and Exchange Traded Products (ETPs). These offer diversification across asset classes and product types, giving our investment managers greater flexibility to respond to changing market conditions – unlike passive strategies that follow a buy-and-hold or static asset allocation model.

By combining different types of index funds, we're able to build more flexible portfolios that address some of the limitations typically associated with passive investing, while still retaining the low-cost advantages that make index funds attractive.

Investors can choose from five risk-rated portfolios, each designed to meet a range of investment needs: including: Cautious, Balanced, Growth, Adventurous and Maximum Growth. The Index MPS can be accessed through tax-efficient wrappers like individual savings accounts (ISAs) and self-invested personal pensions (SIPPs).

Who this solution may suit
Individuals who are more cost-conscious and those seeking the benefits of active asset allocation combined with low-cost passive implementation.

Fast FACTS

- ✓ Low-cost solution
- ✓ Actively managed passive MPS
- ✓ Looks beyond standard market-cap weighted exposures to bring flexibility and greater balance across sectors and styles
- ✓ 5 available models
- ✓ Risk mapped with Defaqto and Dynamic Planner
- ✓ Available via Aberdeen Wrap, AJ Bell, Aviva, Quilter, Scottish Widows, Transact, and Wealthtime

SUSTAINABLE *Managed Portfolio Service*

Actively managed portfolios integrating ESG and sustainability criteria

"We aim to deliver attractive RISK-ADJUSTED RETURNS *alongside* SUPERIOR *sustainability-related characteristics."*

– Genevra Banszky von Ambroz, Lead Portfolio Manager

Our Sustainable MPS (SMPS) is designed to deliver long-term capital growth through a multi-asset, fund-of-funds approach. It is intended for clients seeking to balance financial returns with sustainability-related preferences.

We invest in funds where Environmental, Social, and Governance (ESG) and sustainability considerations are fully integrated into investment decision making; they may contribute to sustainability-related themes such as the United Nations' Sustainable Development Goals. Exposure to activities which are considered incompatible with long-term sustainability objectives is avoided as far as possible.

Investors can choose from six risk-rated portfolios designed to meet a range of client needs and risk profiles. Evelyn Partners has over 10 years' experience in ethical and sustainability-related investing and was among the first to introduce a sustainable MPS range.

The SMPS can be accessed through tax-efficient wrappers like ISAs and SIPPs.

Who this solution may suit

People who wish to align their investments with ethical values and sustainability considerations.

Please note that a sustainability related approach may have a limited investment universe; and this may affect investment performance.

Fast FACTS

- ✓ Actively managed multi-asset approach
- ✓ ESG & sustainability considerations integrated
- ✓ 6 available models
- ✓ Risk mapped with Defaqto, Oxford Risk, and Synaptics
- ✓ Available direct via Evelyn Partners, or via Aberdeen Wrap, Aviva, AJ Bell, Fidelity Adviser Solutions, Novia, Morningstar Wealth Platform, Quilter, and Transact

Our PRO MPS OPTIONS; *either* DUAL-BRANDED *or* TAILORED

Your recommendation. Guided by our NAVIGATION.

DUAL-BRANDED MPS *solutions*

With our Dual-branded Model Portfolio Service (MPS), we offer you the opportunity to co-brand one of our in-house propositions. These MPS's all have distinct features such as passive, active and sustainable criteria. This allows you to use our extensive investment experience and preexisting performance track record, under a dual-branded banner.

We will manage the portfolios on your preferred platform under an agent as client relationship, keeping you up to date in ways that best suit you, including via dual-branded factsheets, emails and webinars. Our Due Diligence tool kit is regularly updated to enable you to monitor our services.

Tailored MPS

Built to your risk profiling and investment mandate, the Tailored MPS offers bespoke model portfolios for you and your clients, giving you more time to focus on your clients and your business.

After understanding your existing investment proposition, we build your investment mandate in line with the financial planning process, client requirements, and Consumer Duty regulations. We support you with all the investment criteria including reporting, factsheets, re-balance notes and access to your Evelyn Partners investment manager.

DISCRETIONARY *Portfolio Service*

A bespoke portfolio with a dedicated investment manager

"BENEFIT *from an* EXPERIENCED *investment team* SELECTING *and* MONITORING *the investments.*"

Every client is different. Our Discretionary Portfolio Service is delivered after understanding the client and financial adviser requirements.

At the core, it's the relationship between the financial adviser and investment manager that allows us to achieve personal investment objectives, while keeping all parties informed in clear non-jargonistic language.

Our flagship Discretionary Portfolio Service is intended for clients where a tailored portfolio is most appropriate to meet an individual's specific goals. At the heart of our process, we seek to preserve and grow the real value of client assets through time. This service enables you to maintain close client contact while delegating the responsibility for managing your clients' investments to Evelyn Partners.

Who this solution may suit
Investors in the decumulation stage, those requiring regular withdrawals, or those with complex tax considerations (for example, CGT), and where specific investment mandates, such as ethical preferences or existing holdings, need to be accommodated.

Fast FACTS

- ✓ Dedicated investment manager
- ✓ Bespoke portfolio using direct equities, direct bonds, collectives and passives
- ✓ Responsible investment options
- ✓ Income needs met, including using gilt ladders and structured products
- ✓ CGT and ISA management
- ✓ Managed for whole family, including children
- ✓ Bespoke investment services for US connected clients*
- ✓ Min investment £350,000
- ✓ Flexibility to accommodate ethical preferences and exclude certain asset classes or funds

* Provided by Evelyn Partners Asset Management Limited (EPAML). EPAML is a regisered investment adviser with the US Securities and Exchange Commission.

CASH *and* CAUTIOUS *Bond Portfolio*

A portfolio for investors looking for an alternative to cash

"The portfolio will be limited to a combination of CASH, T-BILLS, MONEY MARKET FUNDS, *and maturity constrained high-quality* BONDS."

As part of our Discretionary Portfolio Service (DPS), this bespoke portfolio is an actively managed, liquid and fully flexible selection of high-quality cash and bond investments.

For clients who are looking for a solution that aims to beat the returns you can get from a savings account, then the Evelyn Partners Cash and Cautious Bond Portfolio could be the answer.

The portfolio goes further than similar offerings, incorporating not only cash and gilts, but also bonds issued by selected global organisations. These portfolios can be tailored to your client's specific liability preferences, whilst also offering the potential for tax-efficient returns.

Who this solution may suit
Those holding significant cash balances, as well as corporates and charities looking for prudent cash management. This solution may be appropriate for clients such as entrepreneurs following a business exit, clients with known short- to medium-term liabilities such as tax bills, regular care fees or school fees, and higher-rate taxpayers holding large cash balances.

Fast FACTS

- ✓ A low-cost service with no commission or transaction charges
- ✓ Independent investment selection – offering greater flexibility and potential gain
- ✓ The portfolio will be limited to a combination of cash, T-bills, money market funds, and maturity constrained high-quality bonds
- ✓ Flexibility - there is no upper limit to how much can be invested in each portfolio
- ✓ The portfolio offers the potential to be tax efficient

About EVELYN PARTNERS

Defaqto is a leading financial information, ratings and fintech business

Key risks

MPS profiles are tailored to the output of a Dynamic Planner risk profiling process which is complex and not for use without assistance from an adviser. Performance outcomes will depend on the rebalancing and timing of entry and exit to the strategy on the platform.

This information is for UK residents only.

Key themes

- Over 189 years of private client investment management heritage
- A leading investment management firm with some of the UK's most experienced investment professionals
- Over 300 investment managers
- Offices in 21 locations nationally providing a local service to you
- Investment services are underpinned by a disciplined and risk-controlled investment process
- All analysts also manage client assets, providing real life understanding of portfolio management
- Discretionary Portfolio Service, and Managed Portfolio Services achieved 5-star Defaqto ratings

Speak to us

At Evelyn Partners, our mission is to place the power of good advice into more hands. To find out more about the services we offer, please contact your adviser.

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45 Gresham Street, London EC2V 7BG.

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