

MPS Pro

in Collaboration with

EVELYN PARTNERS

At Evelyn Partners we have been working with financial advisers and their clients for over 25 years. We continue to enhance our investment services for advisers, expanding our Managed Portfolio Service (MPS) range with the launch of MPS Pro. These dual-branded and tailored portfolios reinforce your firm's brand and satisfy your clients' investment needs.

Client outcomes

As a financial adviser, it can be time-consuming and expensive to manage portfolios under an advisory service, which can lead to inconsistency between client portfolios.

At Evelyn Partners, under our Discretionary Permissions, we ensure tighter control of client outcomes as we work under a disciplined mandate, defined by you, ensuring clients are invested in a model portfolio aligned to your advice.

Our vast resources ensure there is investment expertise and oversight, something you no longer have to shoulder, thereby reducing risk and cost to your business.

Working with you to build your Central Investment Proposition

The regulatory introductions of MiFID II, PROD and Consumer Duty have added to reporting requirements.

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 grow their business.

Research responsibilities are shared by over 100 investment professionals, allowing us to conduct thorough investment research, find new investment opportunities, provide regular market commentary, and adhere to everchanging regulations.

Dual branded MPS

We respect your integral role in advising your clients. We understand that investment management represents one part of the financial plan you create.

Our dual-branded service gives you access to our very best ideas with our ready-made MPS solutions plus the added value of reinforcing your brand on marketing material, including factsheets, investment updates and brochures.

Our preexisting, ready-made MPS solutions are varied and depending on your appetite for a passive, active, responsible or a blended approach with specialist investment vehicles we have performance track record already available for you to take to your clients, under a dual-branded banner.

As part of our collaboration, we hold regular meetings with your team around rebalances to ensure you are up to date with what changes have been made and why. Our due diligence tool kit is regularly updated to enable you to monitor our services.

Through this service we can support you and your firm's unique identity. We support you, reinforcing your brand and implementing a robust investment process which aims to deliver for your clients.

Tailored MPS

If our ready-made solutions don't fulfil your needs, then our Tailored MPS may be an option. For firms with significant assets under advice, this service offers a range of customised portfolios designed to meet your clients' investment goals.

We will discuss your existing investment management service, for example;

- Analysis of your current client portfolios
- Asset allocations
- Holdings (especially long held and client familiar funds)
- Themes and constraints (e.g. ethical)
- Performance comparators
- Costs
- How you manage and communicate any changes or rebalances with clients
- Which portfolio management tools you use

We work with you to agree an investment mandate that aligns with your financial planning process, including;

- Adapting to your risk profiling tool
- Understanding your preference to the use of passive and active styles
- Utilising your platforms of choice
- Identifying and justifying all costs to the client

We will ensure adherence with Consumer Duty:

- Define our responsibilities as manufacturer and yours as a distributor
- Understand target market requirements
- Demonstrate Fair Value

As with all our platform MPS solutions, we will manage portfolios on a discretionary basis under an agent as client relationship, which means we treat you as our client, in a professional capacity.

The value of investments may go down as well as up and investors may get back less than originally invested.

For advisers who outsource their MPS to Evelyn Partners, together we will meet the compliance obligations both today and on an ongoing basis.

For more information, please
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