

Discretionary Fund Management Service (DFM)

The IP MPS Proposition

- Risk Rated Model Portfolios (aligned to Synaptic risk ratings)
- Discretionary Models with a medium/long-term investment horizon (5/10 years)
- 12 portfolios across 3 ranges - Accumulation (blend), Passive and Income models
- Multi Asset/Multi Index funds as our Core building bricks

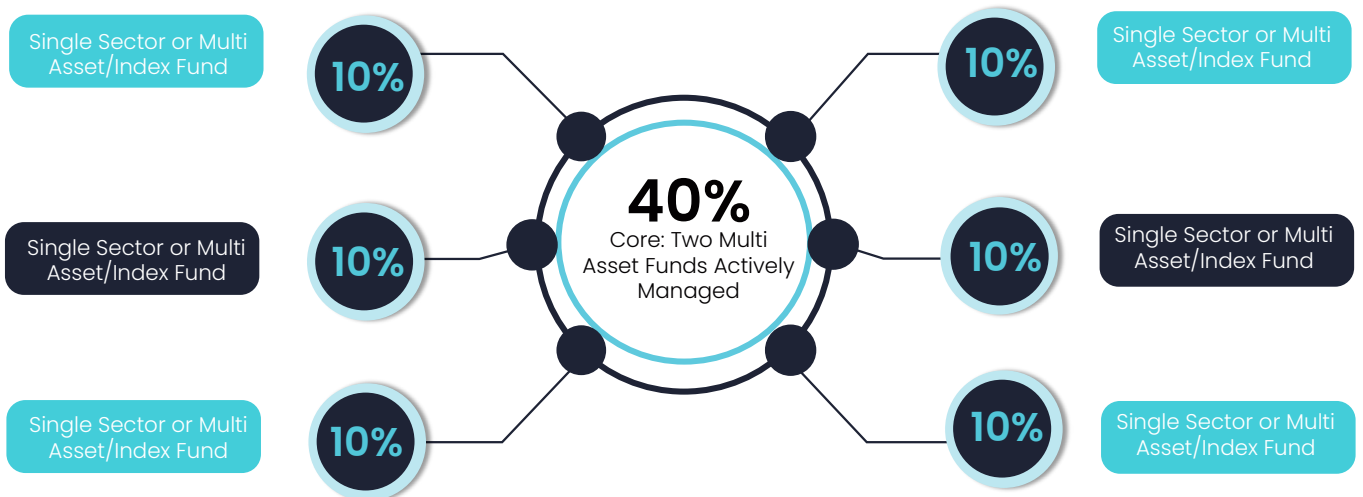
What are you saying and why are you recommending us TO YOUR CLIENTS

- "It's freed up at least 50% of my time so I can concentrate on Financial Planning"
- "It's easy to explain to my clients and they like the low cost"
- "I no longer have to spend time researching lots of funds"
- "My admin staff no longer need to do any rebalances"
- "I understand the benefits of outsourcing to investment professionals"
- "I am confident that by recommending the IP MPS, I'm ticking the boxes for Consumer Duty"
- "I know that when I come to sell my business, the business will be worth more to In Partnership when my clients are invested in the IP MPS"
- "I like it that Martin and his Investment Team are always available to talk to me about the investment strategy"



IN PARTNERSHIP
Financial Advisers

IP MPS portfolio construction



What are the Portfolio Objectives?



Key Information from H1 2024

- £210m AUM
- 32 AR's and 54 advisers have recommended to their clients
- 2nd full audit completed by Minerva Consultants (specialists in auditing DFM's) in Jan 2024. No qualifications and feedback is that the IP investment process is the 'most robust' process they have seen.
- Now on 8 platforms: Aegon, Fidelity, Aviva, Morningstar Wealth, Transact, Quilter, Abrdn and *M&G (*subject to platform roll out)

