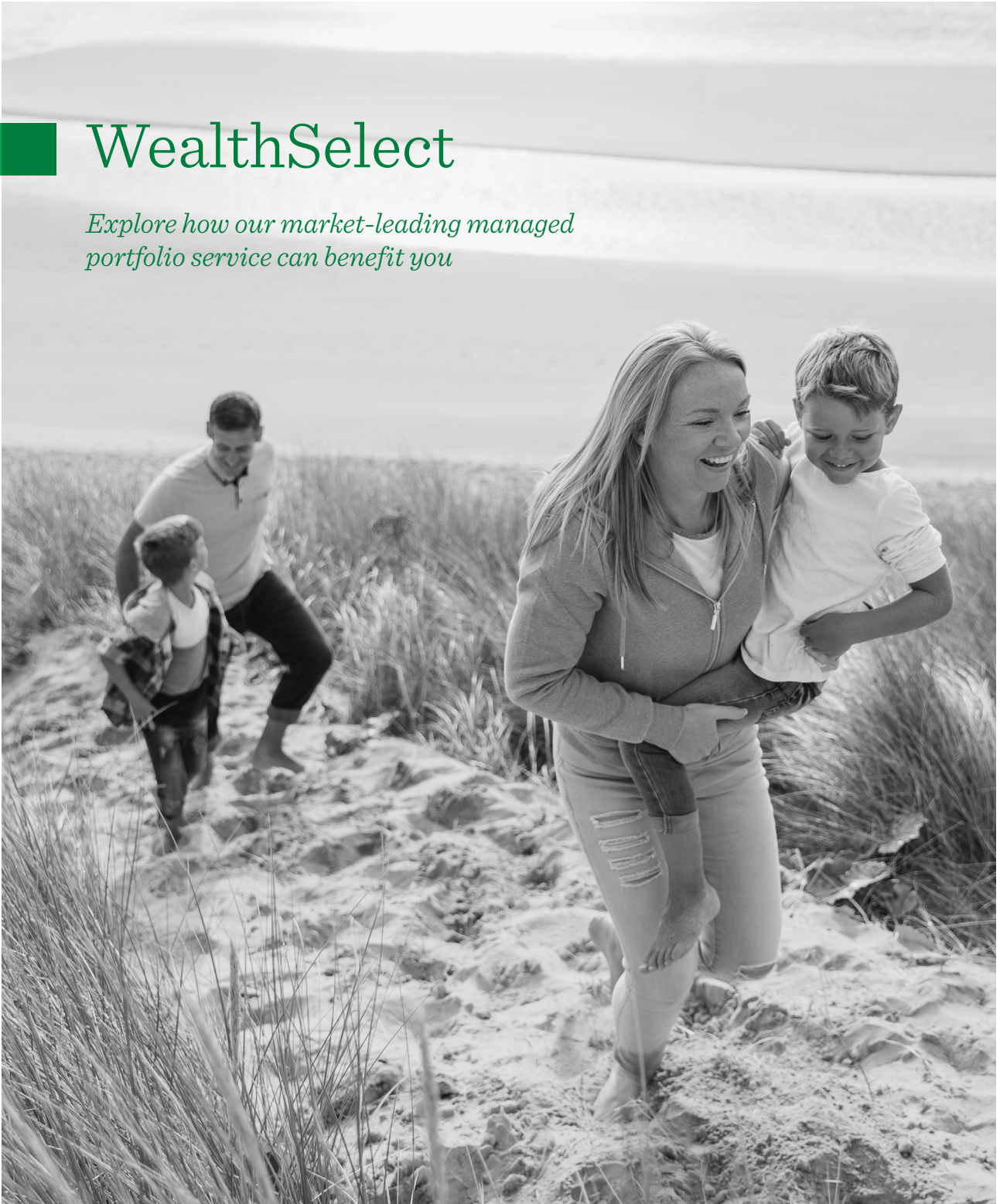


Quilter

WealthSelect

Explore how our market-leading managed portfolio service can benefit you





Your dedicated managed portfolio service

Since 2014, we've been helping people like you achieve their financial goals by harnessing the skills of our investment experts through our managed portfolio service, WealthSelect.

More than 91,000 investors and their families have trusted WealthSelect for their investment journey.



When you invest through WealthSelect, you can enjoy:



A safe pair of hands for your investments



A portfolio that meets your personal needs



Timely and transparent communication

Your WealthSelect portfolio management team



Stuart Clark



Helen Bradshaw



Bethan Dixon

We are excited to be able to offer you a wide range of choice of where you invest and allow you to be confident that we can deliver what you expect.

Stuart Clark, CFA



Providing a safe pair of hands for your investments

At the core of WealthSelect sits our dedicated team of investment experts, who are currently trusted to manage over £14bn of investors' money (as at 24 February 2024).

When you invest with us, you can rest assured that we:

- ✓ carefully craft your portfolio, ensuring you have the right split of funds across a variety of different investments to achieve the correct balance of risk and reward
- ✓ actively choose the funds to buy and sell and decide when to make changes on your behalf, taking care of all the hard work for you
- ✓ constantly monitor your WealthSelect portfolio to make sure it meets the objectives we set to help you achieve your financial goals.





Delivering a portfolio that meets your needs

To help you grow your wealth, our team of experts work closely with your financial adviser. This ensures you receive a high-quality investment portfolio that meets your individual needs.

WealthSelect gives you:

- ✓ the right balance between growing your money and ensuring the portfolio is managed in line with the level of risk agreed with your financial adviser
- ✓ the flexibility to choose between WealthSelect Managed, Responsible, and Sustainable Portfolios, so that your environmental and social preferences are at the heart of your portfolio's strategy
- ✓ the freedom to choose the investment style that is right for you, helping you get the best value from our investment expertise.

The Responsible and Sustainable Portfolios are only available via Quilter's platform.

All of our portfolios are managed in line with our responsible investment principles. When we assess the level of responsible investment integration, we do this at portfolio level as well as for all the underlying assets.

Bethan Dixon
Portfolio Manager, Quilter Investors





Helping you with timely and transparent communication

We understand how important it is to keep you fully informed about your investment journey.

With WealthSelect, you can enjoy regular communication including:

- ✔ Easy-to-read quarterly reports, with key updates from your portfolio management team, so you can stay on top of your investments.
- ✔ Tailored responsible investment reports. If you invest in one of our WealthSelect Responsible or Sustainable Portfolios, you can see how your portfolio is helping achieve the positive outcomes you want.
- ✔ If you invest via Quilter's platform, we help you stay connected to your investments via the Quilter app.





Next step

Your financial adviser is responsible for understanding your specific investment objectives and appetite for risk. They will work closely with you to determine the portfolio that is right for you.

If you have any further questions about WealthSelect, please speak to your financial adviser.



Need additional help reading documents?

More and more of our investors are using screen reading software as a quick and easy way to read their documentation if they are blind, partially sighted, or dyslexic. Alternatively, we can write to you in several alternative formats, such as large print, braille, audio, and OpenDyslexic font.

Find out more about screen readers, accessing your documents online, and our alternative format options at www.quilter.com/document-help.

Important information

Further information on the WealthSelect Managed Portfolio Service can be found at quilter.com/wealthselect.

Investment involves risk. The value of investments and the income from them may go down as well as up and investors may not get back the amount originally invested. Because of this, an investor is not certain to make a profit on an investment and may lose money. Exchange rates may cause the value of overseas investments to rise or fall.

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Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years.

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