



## 8AM Global fact sheet

### What is your corporate background?

8AM Global was founded in 2006 with a view to create investment solutions that supported the issues facing UK advisers. Over the last 5 years, the business has undergone a strategic transformation and now focuses almost entirely on strategic partnerships with select adviser groups and third parties; to design, build and maintain model portfolios to mandate. The CleverMPS suite being the largest and most well known of these strategies.

### Why should I consider using your discretionary fund management service?

The Clever fund selection system is a truly unique proposition in the marketplace, combining unbiased fund analysis and regular automated back testing to ensure that the quantitative measures and thresholds being used to analyse the funds are used in the most effective weightings for the creation of consistent performance. The software suite that surrounds the system also allows for the creation of custom adviser managed portfolios as well as white-labelled emails to clients informing of portfolio alterations every month with supporting documentation and factsheets.

### What is your approach to discretionary fund management?

Combined use of the Clever fund research system and Dynamic Planners risk profiling expertise to create an investment solution that focuses on long-term growth and outperformance through superior fund selection and strategic asset allocation.

### What investment solutions can you offer through the Nucleus platform?

Model Portfolio Service only.

### What are your fees?

0.27% + VAT AMC

### Who should I contact to discuss the service further?

Please contact the Clever team for further details on the Clever offering <https://www.cleveradviser.com>