



## Quilter Cheviot fact sheet



QUILTER CHEVIOT  
INVESTMENT MANAGEMENT

### What is your corporate background?

Quilter Cheviot is one of the UK's largest independently owned discretionary investment firms, providing services to private clients, trusts, charities, pension funds and intermediaries. Our heritage can be traced to 1771.

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

Respected, contemporary and purposeful, we are one of an increasingly small number of long-established names in the investment management sector.

We are at the forefront of development and innovation. We led the way in developing professional investment outsourcing solutions for advisers, providing access to a range of managed portfolio Strategies constructed using carefully researched funds.

We build long-term relationships with advisers and clients, established on a foundation of exemplary personal service and professional expertise. Our regional teams ensure a local presence throughout our 13 offices across the UK, Jersey and Ireland.

Our commitment to excellence has been recognised by the award of a Defaqto 5\* rating for our Managed Portfolio Service and Discretionary Portfolio Service in 2013.

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

Successful investment requires a constantly evolving approach given the dynamic world in which we live. Our investment process keeps ahead of today's changing markets and is flexible enough to accommodate the full spectrum of clients' risk / return requirements.

Our substantial resource of dedicated research analysts and an experienced investment team ensures we are able to identify future trends, select the funds positioned to exploit them and to blend them into a range of optimal collective investment portfolios.

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

#### Quilter Cheviot Managed Portfolio Service

Quilter Cheviot is working with Nucleus and professional advisers to provide clients with a discretionary investment management solution through the Nucleus platform.

Our Quilter Cheviot Managed Portfolio Service on the Nucleus platform was launched in 2011 and gives investors a range of solutions to meet a variety of objectives, timescales and attitudes to risk. We offer five investment Strategies and offer the flexibility for clients to switch seamlessly between them. The five investment Strategies on offer will provide advisers and their clients to meet Conservative, Income, Balanced, Growth and Adventurous risk profiles.

Our five investment Strategies operate within a clear risk-controlled framework. This ensures that the volatility of returns across each Strategy is consistent with our expectations and that any deviations outside these boundaries are reviewed.

#### Quilter Cheviot Managed Portfolio Service benefits

The Quilter Cheviot Managed Portfolio Service provides:

- A choice of five investment Strategies and offer the flexibility for clients to switch seamlessly between them.
- A dynamically managed Strategic and Tactical Asset Allocation, together with active fund selection of leading specialist managers to target long-term outperformance.
- Quarterly factsheets with market commentary
- A portfolio management fee of 0.30% + VAT on the value of the portfolio per annum.

#### Strategic Partners

Quilter Cheviot's strategic partner offering is the premier offering in the market for those financial advisers who want bespoke investment strategies. In addition to the benefits provided by the Quilter Cheviot Managed Portfolio Service, the strategic partner offering provides:

- Bespoke investment strategies designed to meet the needs of financial advisers and their clients.
- Access to Quilter Cheviot's Managed Portfolio Service team and management.
- Quarterly governance meetings.
- Bespoke factsheets.

### What are your fees?

#### Quilter Cheviot Managed Portfolio Service

The annual investment management fee is 0.30 per cent plus VAT.

#### Strategic Partners

Competitive fees are available based on service requirements and scale.

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

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For more information on the Quilter Cheviot Managed Portfolio Service, [please click here](#).