

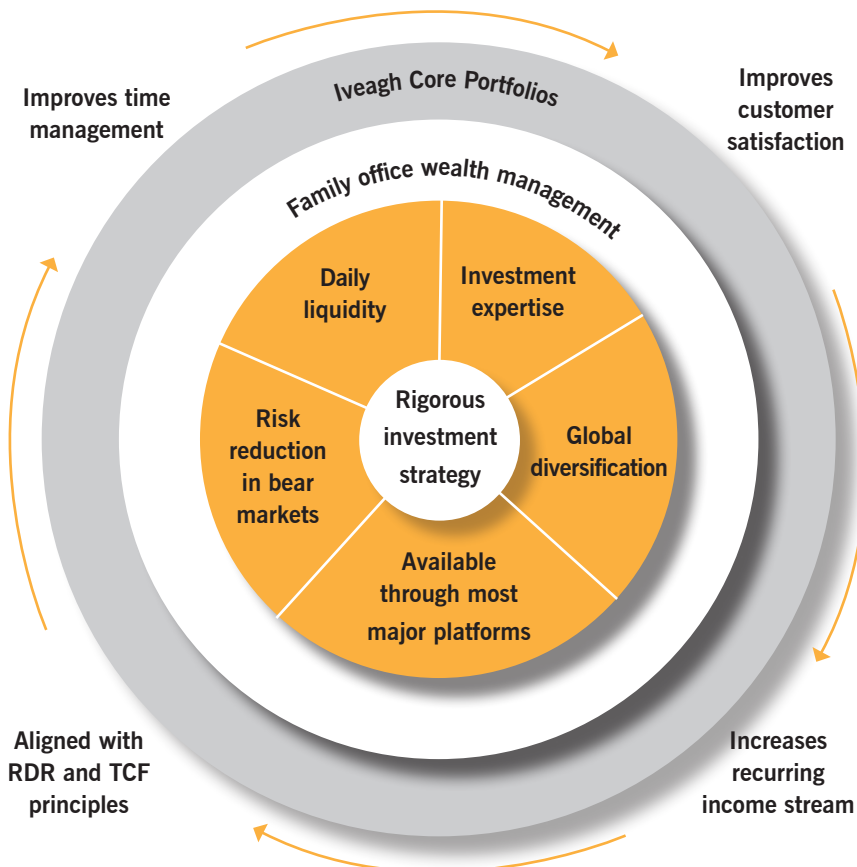
# Iveagh Core Portfolios

## The complete wealth management solution

Providing your clients with investment products that meet their financial goals and investment objectives precisely is an essential part of your business. That is why Iveagh has created the Core Portfolio fund range with six risk and return profiles. You can match each client to a portfolio fund that corresponds to the outcomes of a risk questionnaire designed by Towers Watson, a leading risk management company.

Now you can offer your clients access to the same investment managers, skills and resources employed to manage the Guinness family's private wealth. With a range of portfolios to suit different attitudes to risk, the Iveagh Portfolio funds provide a complete wealth management solution for all types of investors.

*For more information speak to your Iveagh consultant today.*



### Iveagh and your clients

Iveagh Core Portfolios is a comprehensive wealth management solution:

- With six variations of the strategy in the range (Cautious, Moderate, Balanced, Growth, Adventurous and Income), Iveagh Core Portfolio funds are appropriate for all types of clients.
- Managed by experienced investment professionals with a proven track record of preserving and growing wealth over the long term for the Guinness family.
- Low minimum investment levels, a choice of flexible charging structures and available through all major SIPPS, offshore bonds and fund platforms.
- Clear and concise monthly updates including investment commentaries and details of the latest asset allocations and individual holdings.

### Iveagh and your business

Iveagh has designed the Core Portfolio range to align with your business:

- The funds comply with the FSA's treating customers fairly (TCF) principles and comply with the changing regulations before and after the 2013 retail distribution review (RDR).
- In conjunction with Towers Watson, Iveagh provides a paper-based and online client risk questionnaire to help you guide your clients to the appropriate risk-weighted portfolio fund.
- A fully outsourced wealth management platform that allows you to retain control of your clients' business without having to spend time on the day-to-day running of your clients' investments.
- Variable remuneration packages from fee only to ongoing monthly trail and initial commissions.

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### **Important information**

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