



Press Release

1 September 2011

Quilter extends platform offering

Quilter, the specialist wealth manager, today - 1 September 2011 - launches a new platform service that will offer IFAs access to a range of five model portfolios.

As a result of the Retail Distribution Review (RDR), IFAs are increasingly looking to outsource discretionary investment management. This new proposition is based on the Quilter Managed Portfolio Service which is designed to appeal to IFAs and their clients who want to benefit from Quilter's extensive investment management and research expertise through a platform.

Available on the Ascentric/IFDL, Nucleus, Novia, and Præmium platforms, the five investment strategies on offer will provide IFAs and their clients with access to a range of portfolios to meet Adventurous, Growth, Balanced, Income and Conservative risk profiles.

Glenn Hawksbee, Head of Sales at Quilter, said:

"Our model portfolio strategies are extremely popular and I am delighted that we are now able to provide IFAs with the choice of this new platform service alongside our other services, such as our bespoke Discretionary Portfolio Service for high net worth clients. This will allow IFAs to select the most appropriate option to meet their clients' investment needs. The feedback that we have already received indicates that this is going to be a very welcome addition to the range of support services that we offer to IFAs."

Commenting on this new proposition John Martin, Chief Executive Officer at Præmium, said:

"I am delighted that we have formed this strategic partnership with Quilter to make their models more widely available to advisers via Præmium. Our platform provides Quilter with the flexibility to include all the asset types they require to manage their strategies and provides advisers with the flexibility to blend the models appropriately for their clients. This move will allow more advisers and investors to benefit from Quilter's investment expertise being provided for smaller portfolio sizes than is normally possible."

At Ascentric, Richard Goodall the Sales and Marketing Director also expects demand for Quilter's new service to be high, commenting:

"Our driving ambition is to provide advisers with the choice of product and services to help their businesses succeed and ensure they are offering the best possible service to their clients. I am delighted that we are adding Quilter's model portfolios to the platform. They have a very strong track record supporting advisers in constructing and implementing portfolio solutions and their proposition will generate real demand from our users."

Barry Neilson, Business Development Director at Nucleus, is similarly enthusiastic, saying:

"We have worked alongside Quilter before and are always impressed with their offering. Our top priority is always to deliver the highest quality and widest choice to our member-IFAs and their clients and Quilter's model portfolios will be a great addition to our proposition."

Novia will also be offering the new service and Scott Beasley, Novia's Investment Analyst, commented:

"We are delighted to be able to offer these model portfolios through the Novia platform - Quilter is a well established name and is recognised in the investment community as having a strong heritage in investment management and adviser support. The addition of these five model portfolios to the Novia platform provides further choice to advisers when selecting investment options for their clients. We have seen a continued and substantial rise in the use of model portfolios on the Novia platform and this remains the most efficient way for advisers and their clients to access discretionary management."

Ends

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Notes for editors:

Quilter

Quilter is a specialist in personalised investment management services. With approximately £7.8bn of funds under management (as at 30 June 2011) its clients include private clients, charities and trusts, pension funds, corporate bodies and life companies. The company employs approximately 350 staff based in 12 locations throughout the UK, Jersey and Ireland.

Quilter is part of Morgan Stanley Smith Barney. The firm can trace its ancestry back to 1777.

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