

Bespoke DFM

for Advisers and Intermediaries



VISION | IFP

Our Bespoke DFM team are specialists in sustainable investment management. We partner with advisers and intermediaries to offer support and expertise on sustainable investing, tailored to your clients' needs.

✔ Expertise on sustainability

As thought leaders in the sustainable investment space we can help you and your clients stay ahead of the curve.

We can provide detailed analysis of existing client portfolios and impact comparison studies, and we can advise on related best practice including carbon footprinting and offsets.

✔ Bespoke portfolio management

We specialise in the managed transition of existing portfolios to a more impactful approach.

Portfolios can access a wide investment universe including social impact trusts and infrastructure investments, while tax-efficient portfolio management can take into account individual client's tax planning requirements.

✔ For charities, firms and individuals

We cater for individuals and organisations who are passionate about the impact of their investments.

We support trustees to develop sustainable investment policies for charities and endowments, and we help companies think about their messaging to clients and staff about their impact.

What makes us different?

We can tailor the portfolio to your personal sustainability preferences, including a positive impact on the UN Sustainable Development Goals you are most passionate about.

SUSTAINABLE DEVELOPMENT GOALS



Key features

- An end-to-end solution including custody, portfolio management and reporting.
- Assets can be domiciled in the UK or offshore: Pershing Securities (Bank of New York Mellon) provides onshore custody.
- Portfolios can be individually tailored to each client, and managed around specific tax constraints
- Custom impact strategies are possible, based on a wider investment universe than model portfolios
- Investment impact and performance is available online via the EQ Portal with secure document sharing via the EQ Vault.
- Suitable for portfolios over £1 million

How we invest

We offer fully discretionary and advisory portfolio management services based on an institutional, diversified, multi-asset, multi-manager approach. This combines strategic and tactical asset allocation with best-in-class manager selection.

How we engage for impact

By engaging widely with the asset management community, we leverage our investments to push for positive change. We work with our fund managers in a highly collaborative way to implement best practices, and we participate in wider industry groups to continually raise the bar on investment impact.

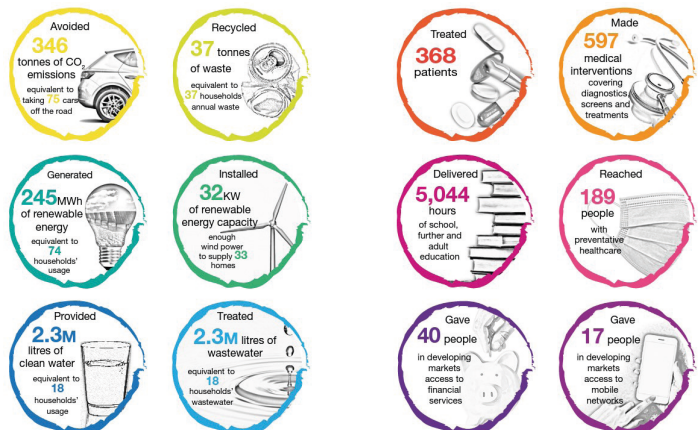


How we report on impact

Detailed analysis and reporting on impact is an integral part of our service. Our client portal offers a breakdown of the impact your investments have made over the last twelve months.



For a live demo visit:
clientportal.eqinvestors.co.uk



Metrics displayed are an example of £1,000,000 invested in an Adventurous portfolio over the last year as of May 2024.

Find out more

If you have a question about the EQ Bespoke Service, please speak to your financial adviser.

Past performance is not a guide to future performance. The value of investments and the income derived from them can go down as well as up, so you could get back less than you originally invested.



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