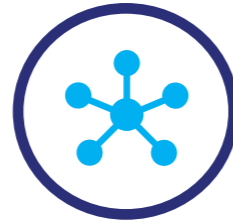


1. Client segmentation

One size definitely does not fit all so a reassessment of your investment client segmentation is a useful starting point. Who is this service likely to benefit? What are those particular investor segments needs?



2. Alignment with your advice process

One of the key benefits of adopting a Model Portfolio Service should be the efficiencies this will bring for both you and your investment clients, reflect on your current advice process will there be significant synergy to deliver those efficiencies?



3. Clear investment philosophy and investment style

Active, Passive or both combined? Can it be understood, can you easily communicate it to your clients, will it give them clarity of the outcome they can expect? What are those particular investor segments needs?

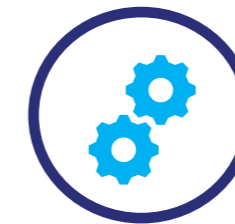


7 considerations in selecting a Model Portfolio service



4. Investor communications

What will you receive and how often? Will this support your regular client engagements making the review more effective and efficient?



5. Service and support

Are the resources adequate? Who will your contact be should you or your clients have a question? Do you have access to the Portfolio Managers if needed?



6. Performance and track record

This is arguably the single most important element, but it should not be considered as the only factor at the exclusion of all others. Depending on the investor segment needs can be different and the track record should be considered in context with the outcome expected, the risk taken to deliver it and the journey the investor will take in terms of volatility.



7. The "fit" with your business

Every advisers business is unique and the importance of the "fit" with an investment partner should not be underestimated in what should be a valuable relationship lasting many years.

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