

# Quilter



## A wealth of expertise and insight

*Your guide to our WealthSelect  
global partners*

*Suitable for financial advice  
professionals only.*

# Overview

*WealthSelect harnesses the power of a select group of high-quality asset managers and brings them together in one place to help you deliver an expertly designed investment solution that you and your clients can trust.*

Our WealthSelect global partners offer a wide choice of different investment strategies across a broad range of asset classes, sectors, and geographies.

We understand that no one can be an expert at everything all the time, so our research and selection process is focused on ensuring our WealthSelect global partners are all high-quality asset managers that have a strong competitive edge in their respective asset class or market.



The value of investments and the income they produce can fall as well as rise. Your clients may get back less than they invested.

### *A wealth of expertise*

Our WealthSelect global partners span the world from San Francisco to Singapore. They offer access to a wealth of insight and expertise – all of which we have brought together to make life easier for you and your clients.

The breadth of the investment offering from our WealthSelect global partners is evidenced by the number of potential investment choices available. In aggregate, they provide access to more than 4,000 different strategies – many of which are not available to retail investors.

For example, JP Morgan offers hundreds of different investment strategies including the JPM US Growth Advantage strategy. This is not available anywhere else in the UK retail market, but it is the strategy behind our US Equity Growth sub-advised mandate.

### *Choosing the best*

Our WealthSelect global partners must all share our commitment to helping your clients achieve their financial goals. Consequently, we use a rigorous research and due diligence process when selecting new partners and monitoring existing ones. Potential candidates are screened against the quality of their investment propositions, their distinctiveness and reach, their level of brand awareness, their commercial standing, and their ability to manage sub-advised mandates.

Just as importantly, all of our WealthSelect global partners must be stable and robust investment businesses. If we cannot be sure that a manager will be 'here tomorrow', then we will not consider entrusting your clients' money with them today.

*Our WealthSelect global partners must all share our commitment to helping your clients achieve their financial goals.*



## *Research and analysis*

Our dedicated manager research team is responsible for identifying and researching the strategies from our WealthSelect global partners.

When validating and assessing current managers and screening for new ones, the team of six analysts focus on in-depth quantitative and qualitative research using a range of analytical applications, proprietary tools, and technical models.

The manager research team also conducts regular meetings with all of our existing managers to ensure the initial rationale for holding the investment still stands.

## *Operational due diligence*

After the manager research team have identified a potential strategy, our operational due diligence team assess the asset manager's financial stability and operational resilience including their investment and operational processes, systems, and resources.

This assessment is completed to determine the suitability of the investment managers identified by our manager research team.

The operational due diligence team aim to identify and mitigate operational risk before and after investment.

This in-depth analysis is broken down into a number of component parts, including:

- Organisational structure and governance
- Reputation
- Responsible investment
- Operations and technology
- Compliance and audit
- Human resources
- Fund structure

## *Sub-advised mandates*

Where appropriate, we ask our WealthSelect global partners to manage the selected investment strategy as a sub-advised mandate. This approach can offer many benefits and advantages to you and your clients.

### **Enhanced control**

The investment adviser typically runs the sub-advised mandate in a similar way to their main retail fund. However, the sub-advised mandate allows us to refine the investment strategy to reflect a desired customer objective. For example, we can choose where the fund invests, its exposure to unlisted stocks, or where it sits on the market-cap spectrum.

### **Greater transparency**

Sub-advised mandates offer us access to the underlying holdings, providing sight of every individual trade and deal placed. We can easily understand any risks and ensure the investment adviser is running the strategy in the way we would expect.

This enhanced visibility also allows better insight for our portfolio managers and enhanced reporting for your clients.

### **Increased flexibility**

We select each investment adviser with a long-term view, but the flexibility provided by a sub-advised mandate can be very beneficial to you and your clients.

If we want to change an investment adviser, the flexibility of the sub-advised mandate means this can be managed far more efficiently than a standard switch from one fund to another.

### *Oversight and monitoring*

Our WealthSelect global partners and the sub-advised mandates are subject to a number of layers of oversight and governance to give you and your clients added confidence.

#### **Regulatory responsibility**

Quilter Investors Limited is the Authorised Corporate Director (ACD) for all of the sub-advised funds managed by our WealthSelect global partners. They ensure the investment advisers are suitable individuals and capable of delivering the objectives of the funds.

#### **Strong governance**

We also have a robust and consistent governance framework that provides independent oversight of the investment advisers' investment selection, best execution, liquidity management, and asset valuation activity.

Our governance structure also provides the opportunity to review and challenge proposals for changes to investment advisers, assess performance of the sub advisers' relative to expectations, and ensure the investment advisers remain appropriate to provide robust investment solutions offering good outcomes for your clients.





# A wealth of expertise

*Our WealthSelect global partners are home to some of the world's best known fund managers. Many of the sub-advised mandates will be run in a similar way to their existing retail strategies, but with added governance, oversight, flexibility, and transparency.*

## *Sub-advised mandates and their investment advisers*



*Quilter Investors Europe  
(ex UK) Equity Growth*

Thorsten Winkelmann, Marcus Morris-Eyton, Darina Valkova, Robert Hofmann, and Nicolas Goncalves



*Quilter Investors Emerging Markets Equity Income*

Alison Shimada



*Quilter Investors UK Equity Large-Cap Income*

Adrian Frost, Nick Shenton, and Andy Marsh

*Quilter Investors UK Equity Opportunities*

Andy Gray and Henry Flockhart



*Quilter Investors Precious Metals Equity*

Evy Hambro and Tom Holl



*Quilter Investors US Equity Income*

John Bailer, Brian Ferguson, and Keith Howell Jr.



*Quilter Investors Asia Pacific (ex-Japan) Equity*

Anthony Srom

*Quilter Investors Sterling Corporate Bond*

Kristian Atkinson and Shamil Gohil



*Quilter Investors Asia Pacific (ex Jap) Large-Cap Equity*

William Lam

*Quilter Investors Investment Grade Corporate Bond*

Michael Matthews

## J.P.Morgan

ASSET MANAGEMENT

*Quilter Investors Emerging Markets Equity Growth*

Leon Eidelman

*Quilter Investors Long Short Equity*

Jon Ingram

*Quilter Investors US Equity Growth*

Felise Agranoff and Larry Lee

## Janus Henderson

INVESTORS

*Quilter Investors Absolute Return Bond*

Daniel Siluk and Addison Maier

*Quilter Investors Absolute Return Equity*

Ben Wallace and Luke Newman

*Quilter Investors Europe (ex UK) Equity*

Marc Scharzt and Robert Schramm-Fuchs

*Quilter Investors Natural Resources Equity*

Daniel Sullivan and Darko Kuzmanovic



*Quilter Investors Asia Pacific*

Amadeo Alentorn

*Quilter Investors Emerging Markets Equity*

Tarlock Randhawa

*Quilter Investors Global Equity Absolute Return*

Amadeo Alentorn

*Quilter Investors North American Equity*

Amadeo Alentorn

*Quilter Investors UK Equity*

Errol Francis

*Quilter Investors UK Equity Growth*

Chris Smith



*Quilter Investors China Equity*

Dave Perrett

*Quilter Investors Japanese Equity*

Carl Vine



*Quilter Investors Timber Equity*

Christoph Butz and Mikael Jafs



*Quilter Investors Corporate Bond*

Lloyd Harris and Simon Prior

*Quilter Investors Diversified Bond*

Lloyd Harris and Simon Prior



*Quilter Investors Global Equity Value*

Nick Clay

## Schroders

*Quilter Investors Europe (ex UK) Equity Income*

Andrew Lyddon

*Quilter Investors Sterling Diversified Bond*

Julien Houdain, Martin Coucke, and Daniel Pearson

*Quilter Investors US Equity Small/Mid-Cap*

Bob Kaynor



*Quilter Investors Dynamic Bond*

Eoin Walsh, Felipe Villarroel, and David Norris

## *Important information*

### *quilter.com*

*This communication is issued by Quilter, a trading name of Quilter Investment Platform Limited and Quilter Life & Pensions Limited, who provide the WealthSelect Managed Portfolio Service.*

*Quilter Investment Platform Limited and Quilter Life & Pensions Limited are registered in England and Wales under numbers 1680071 and 4163431, respectively. Registered office at Senator House, 85 Queen Victoria Street, London, EC4V 4AB.*

*Quilter Investment Platform Limited is authorised and regulated by the Financial Conduct Authority. Quilter Life & Pensions Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.*

*The Quilter Investors Absolute Return Bond Fund, Quilter Investors Absolute Return Equity Fund, Quilter Investors Asia Pacific (ex Japan) Equity Fund, Quilter Investors Asia Pacific (ex Japan) Large-Cap Equity Fund, Quilter Investors China Equity Fund, Quilter Investors Corporate Bond Fund, Quilter Investors Diversified Bond Fund, Quilter Investors Dynamic Bond Fund, Quilter Investors Emerging Markets Equity Fund, Quilter Investors Emerging Markets Equity Growth Fund, Quilter Investors Emerging Markets Equity Income Fund, Quilter Investors Europe (ex UK) Equity Fund, Quilter Investors Europe (ex UK) Equity Growth Fund, Quilter Investors Europe (ex UK) Equity Income Fund, Quilter Investors Global Equity Absolute Return Fund, Quilter Investors Global Equity Value Fund, Quilter Investors Investment Grade Corporate Bond Fund, Quilter Investors Japanese Equity Fund, Quilter Investors Natural Resources Equity Fund, Quilter Investors Precious Metals Equity Fund, Quilter Investors Sterling Corporate Bond Fund, Quilter Investors Sterling Diversified Bond Fund, Quilter Investors Timber Equity Fund, Quilter Investors US Equity Growth Fund, Quilter Investors US Equity Income Fund, and Quilter Investors US Equity Small/Mid-Cap Fund, are sub-funds of Quilter Investors OEIC, and investment company with variable capital incorporated in England and Wales, and the Quilter Investors Asia Pacific Fund, Quilter Investors North*

*American Equity Fund, Quilter Investors UK Equity Fund, Quilter Investors UK Equity Income Fund, and Quilter Investors UK Equity Large-Cap Income Fund, and Quilter Investors UK Equity Opportunities Fund are sub-funds of Quilter Investors Trust, an authorised unit trust scheme. Quilter Investors OEIC and Quilter Investors Trust are authorised by the Financial Conduct Authority as UCITS schemes and can be distributed to the public in the United Kingdom.*

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