Quilter

Invest without compromise

Your guide to the WealthSelect Managed Portfolio Service

Suitable for financial advice professionals only.

Contents

Andy Miller

Lead Investment Director, Quilter

Thank you for considering the WealthSelect Managed Portfolio Service.

With a strong track record of delivering exceptional investment outcomes, WealthSelect offers you the optionality and flexibility to meet the needs and preferences of a wide range of your clients.

We never lose sight of the faith you place in us when you choose Quilter for your clients' investments. In return, we apply the highest levels of care, discipline, and focus to every decision we make, so you can be confident your clients' investments are in safe hands.

Introducing WealthSelect

Since its launch in 2014, WealthSelect has been at the forefront of innovation, providing financial advisers like you with a pioneering discretionary multi-asset investment solution.

Today, WealthSelect stands as one of the UK's largest and most comprehensive managed portfolio services, empowering you to meet the investment goals of your clients while helping you dedicate more of your time to their wider financial planning needs.

With an exceptional team of investment professionals at the helm, WealthSelect boasts an enviable performance track record across a variety of different market cycles.

Supporting more than

5,900

financial advisers

Helping more than

145,000

investors and their families

Trusted with more than

£26.1bn

of assets under management

31 March 2026

defaqto Best Overall Active Range 2026 WINNER

defaqto DFM MPS (Platform) Family 2026 EXPERT RATED

defaqto EXPERT RATED

The WealthSelect Managed Active and Managed Blend portfolios have achieved a Defaqto 5 Diamond Rating. The other portfolios do not have the required five-year performance track record.

The Defaqto Best Overall Active Range was awarded to the WealthSelect Managed Blend Portfolios.

Offering flexibility and choice

We offer 56 different portfolios, allowing you to choose a portfolio that aligns with the needs and preferences of your clients today, while having the flexibility to adapt in the future.

Each portfolio targets a specific range of volatility with a choice of active, blend, or passive investment management. In addition, WealthSelect caters for a wide range of your clients' responsible investment preferences.

Introducing the WealthSelect portfolios:

WealthSelect Managed Portfolios

- Aim to achieve capital growth over a period of five years or more.

WealthSelect Responsible Portfolios

- Aim to achieve capital growth over a period of five years or more.
- Maintain a smaller carbon footprint than the reference index (MSCI ACWI).
- Invest in funds that we identify as leaders in the integration and management of ESG factors.

We also invest at least 50% of the portfolio in funds that have explicit environmental and/or social targets or characteristics.

WealthSelect Sustainable Portfolios

- Aim to achieve capital growth over a period of five years or more.
- Seek to support sustainable solutions to environmental and social challenges.
- Maintain a smaller carbon footprint than the reference index.
- Minimise exposure to unsustainable activities.
- Invest in funds that target a broad range of sustainable outcomes.

Where the availability of funds that are leaders in the integration and management of ESG factors (Responsible Portfolios) or that target sustainable outcomes (Sustainable Portfolios) is limited in an asset class, and exposure is required to achieve a diversified portfolio, we may invest in funds that do not meet these criteria.

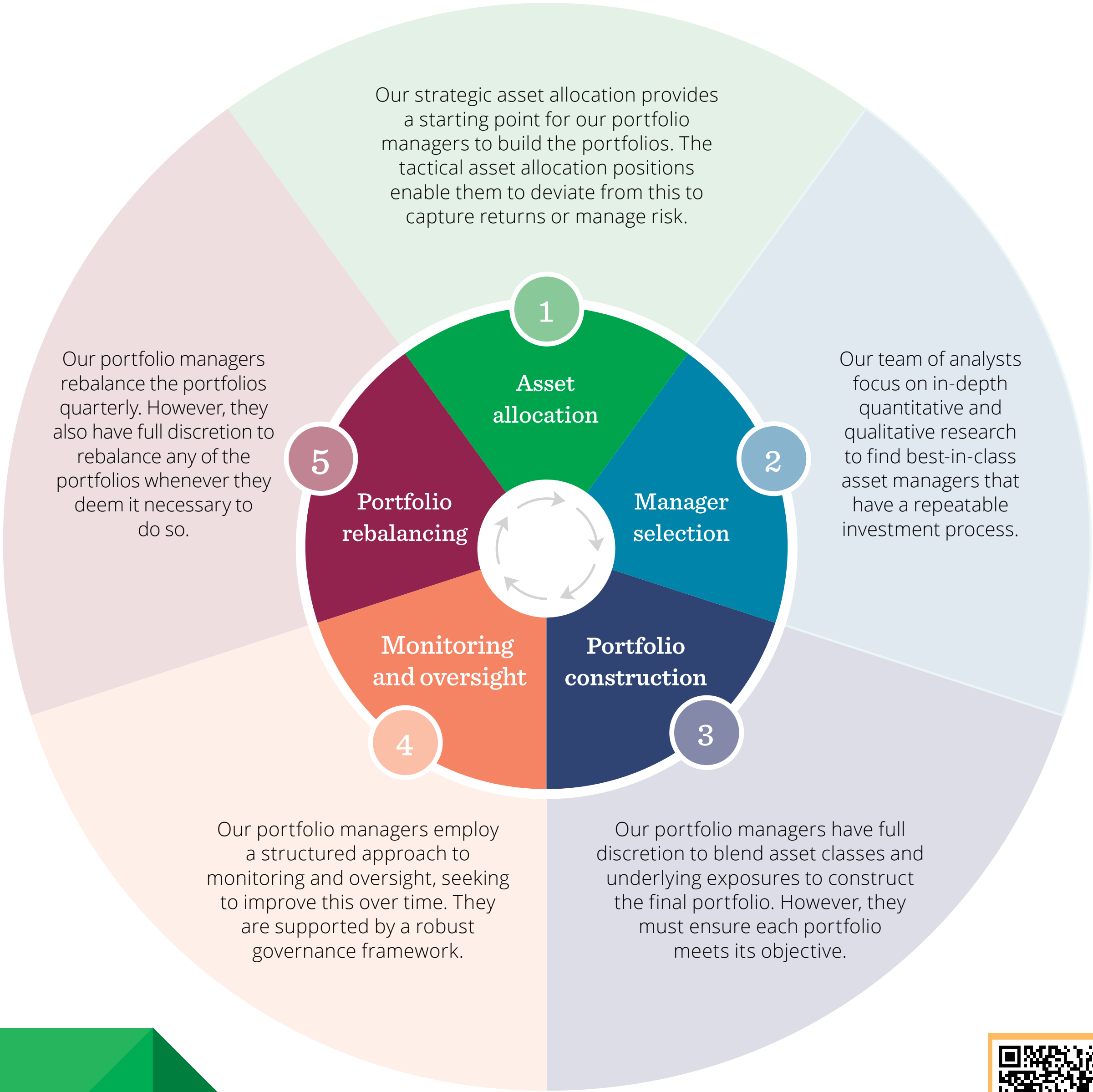
Please note, there may be occasions when the Sustainable Portfolios invest in companies involved in areas we are trying to avoid. We will only do this on an exceptional basis when those companies make a net positive contribution to the sustainable investment objectives of the portfolio.

The Responsible and Sustainable portfolios are only available via Quilter's platform.

Delivering an established investment process

We take care of all the asset allocation, fund research, and portfolio management for you. This means you can dedicate more of your time to the financial planning needs of your clients and building valuable, long-term relationships.

There are five key stages to our investment process, each of which is overseen by robust governance and controls:



For more information on our investment process, open the camera app on your phone and scan the QR code, or *click here.*

Scan me

A depth and breadth of talent

Our portfolio managers are supported by our dedicated research hub, which combines our manager research, operational due diligence, and responsible investment teams. This, along with our investment risk, dealing and implementation, and investment strategy teams ensures we have the depth and breadth of investment expertise to manage portfolios that can meet the needs of a wide range of your clients.

Portfolio managers

Helen Bradshaw

Stuart Clark

Bethan Dixon

Supported by the following teams:

- Manager research
- Dealing and implementation
- Operational due diligence
- Investment strategy
- Responsible investment
- Investment governance
- Investment risk

A partnership of expertise

Our WealthSelect global partners are a select group of high-quality asset managers that have a strong competitive edge in their respective asset class or market. They provide the building blocks we use in WealthSelect.

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

Enhanced control

We can refine an investment strategy to reflect a desired investment objective.

Greater transparency

We can see the underlying holdings, providing visibility of every individual trade.

Increased flexibility

We can change an investment adviser more efficiently than switching funds.

Our WealthSelect global partners:

Our WealthSelect global partners are a select group of high-quality asset managers that have a strong competitive edge in their respective asset class or market.

Giving you the complete picture

In today's fast-moving world, we know how important it is to keep up-to-date with the latest news and information. WealthSelect offers a range of commentaries, reporting, and webinars to support you and your clients.

Monthly commentaries

The portfolio management team provide a monthly portfolio commentary and investment outlook that you can share with your clients. The commentary includes the latest performance and portfolio information as well as a market update from our Chief Investment Officer, Marcus Brookes.

Quarterly reporting

We keep you and your clients informed by giving you access to quarterly reports. If you invest via Quilter's platform, the reports are bespoke to your clients and can be co-branded with your company logo and information to keep your firm centre-stage.

Adviser webinars

We understand that keeping you informed about the management of the portfolios and how they are performing is a key factor in ensuring the ongoing suitability of the portfolios for your clients. We present a quarterly update webinar to discuss the performance of the portfolios and their current positioning.

Offer your clients an enhanced investment experience

With Quilter and WealthSelect, you are in control with the services you offer your clients. More and more advisers like you are encouraging their clients to activate their Quilter online accounts. This has a number of benefits to both you and your clients.

- **Easy and instant access** allowing you to retain control.
- **Reassurance** that important documents are never lost.
- **Safe and secure** communication of client information.

For more information on our app and online Customer Centre, open the camera app on your phone and scan the QR code, or ***click here.***

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"We are very aware of the efforts you make to get to know your clients and understand their appetite for risk.

We make sure we deliver portfolios aligned to this while also aiming to maximise returns."

Bethan Dixon, Stuart Clark, and Helen Bradshaw
WealthSelect Portfolio Managers

Helping your clients

We have built WealthSelect with your clients in mind, providing them with a discretionary investment solution that can help them achieve a brighter financial future. With WealthSelect, your clients can enjoy:

Choice underpinned by expertise

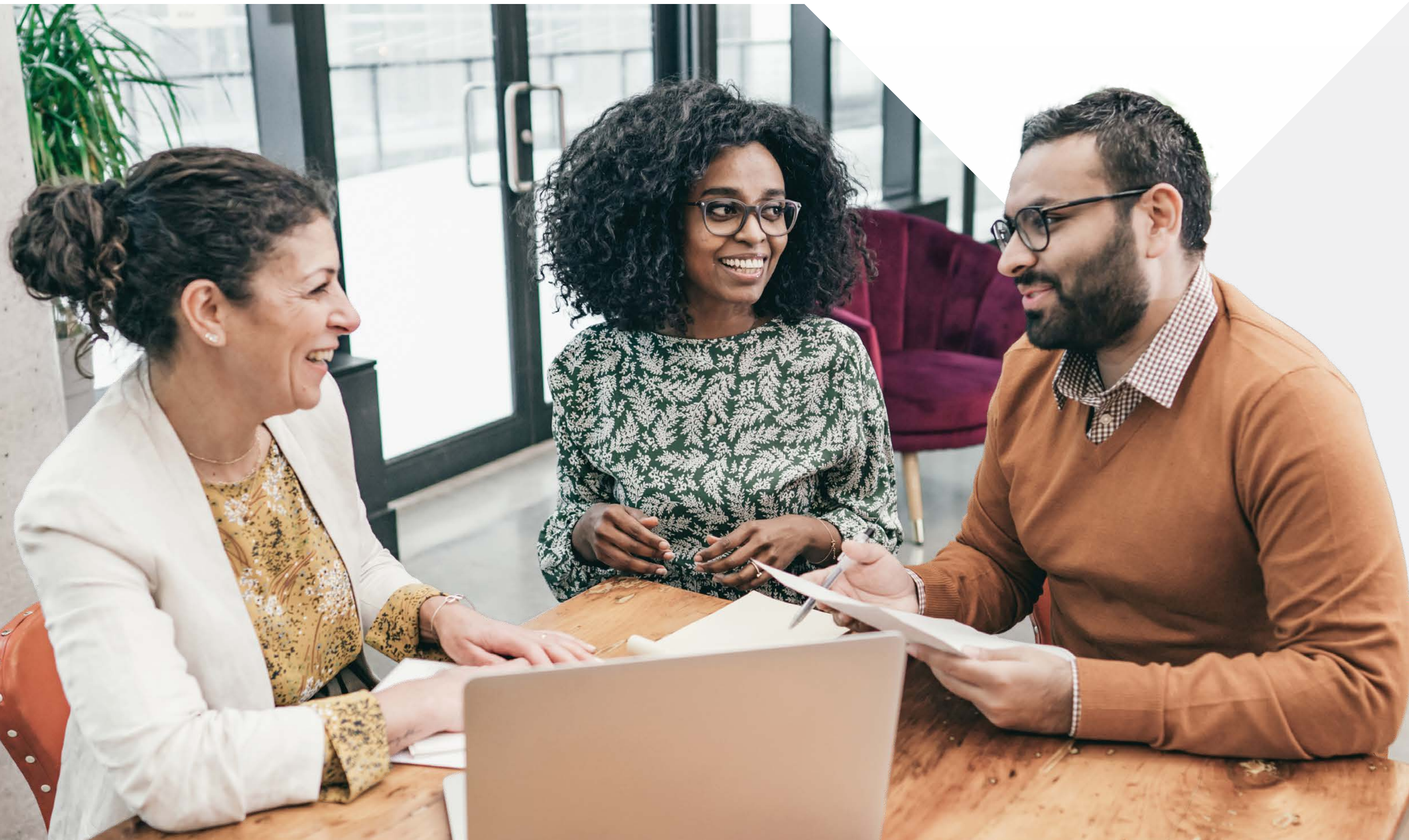
We offer a wide range of portfolios to meet the unique needs of your clients, all managed by our team of investment experts. Your clients can be assured that their investments are being constantly monitored and actively managed to ensure they meet their objectives.

Easy to access information

We provide your clients with monthly and quarterly commentaries to keep them updated on their investments. If you invest via Quilter's platform, you can also provide your clients with high-quality, personalised reporting that can be co-branded with your company logo.

Family wealth planning

You can combine the investment power of WealthSelect with family-linking discounts, intergenerational tax wrappers, and the widest range of trusts when you invest via Quilter's platform. This powerful combination enables you to help your clients build intergenerational wealth.



Supporting you

WealthSelect has been designed to help your clients achieve their investment goals and deliver exceptional outcomes for you. With WealthSelect, you can enjoy:

More time for your clients

We manage all the fund research, monitoring, asset allocation, rebalancing, governance, and reporting for you. This means, you can dedicate more time to the financial planning needs of your clients and build valuable, long-term relationships.

Reduced regulatory risk

The uncertainty caused by the continually evolving regulatory landscape can be overwhelming. WealthSelect can help lower your regulatory risk and reduce the administration burden for you, your business, and your clients.

Increased value

All parts of the advice value chain have needed to reassess how they demonstrate they are delivering value. WealthSelect can help you streamline your processes and manage costs, while still offering excellent outcomes for you and your clients.

Your next step

We are dedicated to making sure your journey with us is as smooth as possible, so get in touch with your investment director to find out more about how WealthSelect can meet the needs of you and your clients.

Contact your Quilter investment director:

Scan me

1. *Open the camera app on your phone.*
2. *Scan the QR code.*
3. *Tap to open the website.*
4. *Call their direct number.*

ask@quilter.com

quilter.com/wealthselect

“*WealthSelect has been hugely successful, and we are proud of the relationships we have built with advisers like you.*

WealthSelect is designed to make your life easier and help you deliver an exceptional service to your clients.”

Steven Levin
CEO, Quilter

Thank you for considering WealthSelect for your clients.

quilter.com

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