

Quilter

Invest without compromise

*Your guide to the WealthSelect
Managed Portfolio Service*

*Suitable for financial advice
professionals only.*



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Andy Miller

Lead Investment Director, Quilter

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Thank you for considering the WealthSelect Managed Portfolio Service.

With a strong track record of delivering exceptional investment outcomes, WealthSelect offers you the choice 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, giving you confidence that your clients' investments are in safe hands.

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Introducing WealthSelect

WealthSelect is the UK's largest and most trusted managed portfolio service with over £30bn of assets under management. More financial advisers choose WealthSelect than any other managed portfolio service.

But size alone isn't the whole story. Our scale gives you access to dedicated teams covering portfolio management, research, risk, and operations. More than 30 investment professionals follow a disciplined investment process focused on delivering the right outcomes for you and your clients.

Today, more than 6,000 advisers rely on WealthSelect to support their advice recommendations – helping over 151,000 investors and their families achieve their financial goals.

Supporting more than

6,000

financial advisers

Helping more than

151,000

investors and their families

Trusted with more than

£30bn

of assets under management

Data as at 10 August 2026



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, helping 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.
- ▶ Manage the environmental, social, and governance (ESG) risk.
- ▶ Invest at least 70% in funds that demonstrate leading ESG integration (tier 2 funds) or target sustainable outcomes (tier 3 funds) as classified using our responsible investment tier framework.

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 sustainable outcomes.

For more information on our responsible investment tier framework [click here](#).

Where the availability of funds that demonstrate leading ESG integration or target sustainable outcomes 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 activities 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 portfolios.

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](#).



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. Together with our investment risk, dealing and implementation, and investment strategy teams, this 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**



**Operational
due diligence**



**Responsible
investment**



**Investment
risk**



**Dealing and
implementation**



**Investment
strategy**



**Investment
governance**

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.

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



Enhanced control

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



Greater transparency

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



Increased flexibility

We can change the investment adviser responsible for managing the strategy.

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. We offer a range of commentaries, reporting, and webinars to keep you and your clients informed.



Monthly commentaries

The portfolio management team provides 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, 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](#).



Scan me



“ 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 feel confident that their investments are being constantly monitored and actively managed to ensure they meet their objectives.



Easy to access information

We provide monthly and quarterly commentaries to keep your clients informed about 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 administrative burden for you, your business, and your clients.



Increased value

Across the advice value chain, firms are reassessing how they demonstrate value. WealthSelect can help you streamline your processes and manage costs, while continuing to support good outcomes for you and your clients.



Your next step

We are dedicated to making sure your journey with us is as smooth as possible. Please 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:



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

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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

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Thank you for considering WealthSelect for your clients.

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.

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