Suitable for financial advice professionals only

A powerful combination

WealthSelect and our Collective Investment Bond

As more advisers turn to onshore bonds to support clients with inheritance tax and long-term wealth planning, choosing the right investment solution becomes increasingly important.

WealthSelect is the UK's largest managed portfolio service. Trusted by more financial advisers than any other MPS. It has been designed to meet the investment goals of your clients while helping you dedicate more of your time to their wider financial planning needs.

5,900+
financial advisers supported

£26.1bn
assets under management

defaqto ★★★★★ DFM MPS on Platform 2026 EXPERT RATED

When used within our onshore bond, the Collective Investment Bond, WealthSelect delivers a range of benefits for you and your clients:

More time for advice

Our dedicated team of experts take care of the asset allocation, fund research, and portfolio management, freeing you up to focus on the growing financial planning needs of your clients.

Tax-planning flexibility

Unlike any other MPS within our onshore bond, the WealthSelect portfolio management charge does not count towards your client's 5% tax-deferred allowance. This gives them greater tax-planning flexibility while also making it easier for you.

A portfolio for every client

WealthSelect offers 56 portfolios across eight risk levels, offering you a suitable solution for nearly every client. If bond segments are assigned to loved ones or placed in trust, the underlying portfolio can be changed to meet the needs of each beneficiary.

Peace of mind for trustees

Diversified portfolios, clearly defined risk targets, and regular reporting can help trustees fulfil their responsibilities with confidence, while helping you demonstrate suitability and robust governance.

An expert choice for your next recommendation

The next time you are recommending our onshore bond to one of your clients, remember that WealthSelect offers a trusted, independently rated option designed to help you and your clients achieve more.

quilter.com

Quilter

All data as at 31 March 2026.