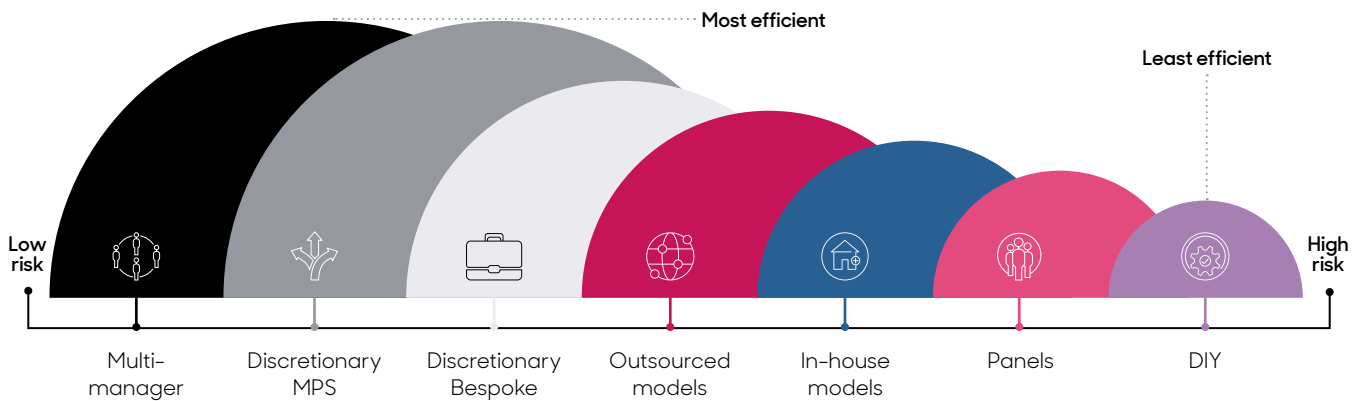


# Centralised Investment Proposition (CIP) Options on Platforms

There are a number of options available to clients of financial advisers through investment platforms to offer a cost effective solution with a variety of risk profiles suited to everyone.

## Investment process options



Differences and similarities between multi-asset funds, adviser model portfolios, and MPS discretionary via platforms.

Features	Multi-asset funds	Advisory Model Portfolios	Discretionary MPS via Platform
Portfolio Mandate	Set by manager	Set by provider, or adviser	Set by manager
Investment Minimums	None	Usually set by platform	Usually set by platform
Charges	One fee quoted at fund level	Dependent on funds in portfolio	Dependent on funds in portfolio, and investment style DFM fee applies
Transparency	Easy to access both past performance and costs	Dependent on platform capability, or use of 3rd party tools	Yes but Dependent on platform functionality
Risk Profiled	Yes	No	Yes
Portfolio of individual funds published	Dependent on provider	Yes	Yes
Valuations	Priced daily. Prices available via platforms	Typically priced daily. Prices available via platforms	Priced daily. Prices available via platforms
Administration	Low	High	Low
Scalability	High	Low	High

## Enabling your clients to plan, save and invest



# abrdrn investment solutions

Our range offers investment solutions to include active, passive, blended options and the ability to meet client's suitability preferences.

	abrdrn MyFolio	abrdrn Discretionary MPS
Client Risk Profiles	5	5
Investment Styles	7	4
Risk Mapping	Defaqto, Dynamic Planner, Synaptic, Finametrica	Defaqto, Dynamic Planner, Synaptic, Finametrica, Oxford Risk, Evaluate
Strategic Asset Allocation (SAA)	Set annually, reviewed quarterly Uses 10 year forward looking asset class forecasts	Set annually reviewed quarterly Uses 10 year forward looking asset class forecasts
Passive Options	Yes	Yes
Active Options	Yes	Yes
Sustainable Options	Yes	Yes
Charges	From 0.20% OCF depending on range selected	DFM fee between 0.10%-0.25% depending on range selected
Adviser Support	Quarterly Webinars Adviser Guide Client Guide Monthly Portfolio factsheet Quarterly Reports Thought leadership material and support Portfolio Lookthrough Tool Asset Class Forecaster tool	Quarterly Webinars Adviser Guide Client Guide Monthly Portfolio factsheet Quarterly Reports Thought leadership material and support Ability to co-brand Tailored Solutions available when working in partnership with adviser firms

Independent assessment of our portfolios is available through



The value of investments and the income from them can go down as well as up and investors may get back less than the amount invested. Past performance is not a guide to future results.

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[abrdrn.com](http://abrdrn.com)

## What can abrdrn platform solutions offer you and your clients?

- Only platform provider awarded an 'A' rating for financial strength (AKG)
- Commitment to service excellence with our award winning servicing teams
- A broad range of investment options offering you the choice in how you want to manage your clients investment proposition with model portfolio and bespoke discretionary manager services available
- Clear and transparent pricing with innovative Drawdown Pricelock feature on Wrap and family linking options
- Wide range of tools and tax wrappers to optimise tax allowances for your clients.



## Want to discuss more?

Contact your local abrdrn representative.