

## MyNorth Diversified Managed Portfolios

### More wealth and tax efficiencies - across your clients' investment journey

#### A suite of 22 multi-asset portfolios across 3 core strategies

1. Passive | **Diversified Index**
2. Active/passive core/satellite blend | **IndexPlus**
3. Active | **Research Choice Accumulator, Objectives-based and Income**



#### For clients

The portfolios cater to clients' evolving:

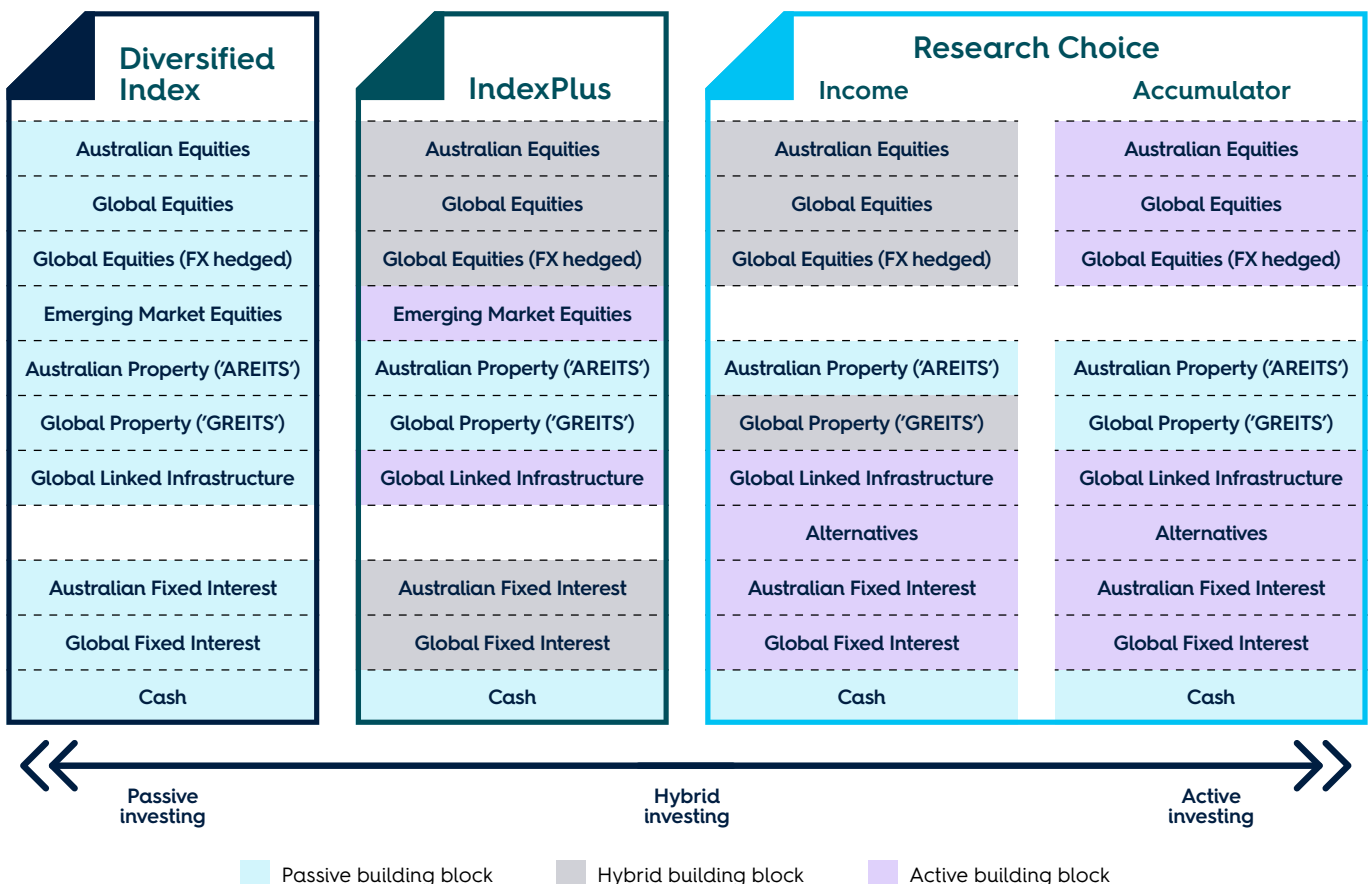
- **needs** - accumulators through to retirees
- **preferences** - multiple risk profiles and levels of sophistication
- **circumstances** - minimise CGT through in-specie transfers.



#### For advisers

They also provide benefits for you, including:

- **convenience** - off-the-shelf or part of a bespoke investment philosophy
- **efficiency** - as clients become more sophisticated or their needs change
- **confidence** - professionally managed, single investment philosophy.



# MyNorth Diversified Managed Portfolios

## The tax benefits of managed portfolios

Tax is an often overlooked aspect of the investment journey. Inevitably, a client's goals or circumstances will evolve, prompting a need for change in their investment portfolio.

MyNorth Managed Portfolios seek to maximise in-specie transfer benefits. This enables an adviser to minimise a client's CGT when:

- De-risking ahead of retirement as part of a decumulation strategy
- Increasing a client's risk profile towards the start of their adviser-led investment journey
- Introducing or removing active management.

Anytime your client's goals or circumstances change, MyNorth Managed Portfolios can potentially offer a low-cost and tax-efficient way to evolve their investment portfolio.

## Why North

### A better way to invest

#### We stand for client-centric investing

North's professionally Managed Portfolios offer choice and flexibility to meet a range of goals.



#### A focus on technology

Technology that creates efficiencies so you can focus on providing holistic advice.



#### Same-day switching

Transfer assets in or out of a Managed Portfolio with no cost.



#### Fractional share trading

Reduce investment minimums and keep your clients in market for longer – exclusive to North.



#### We're here to help you so please get in touch

To find out more about how MyNorth Diversified Managed Portfolios can help your business and your clients, contact your BDM or portfolio specialist.



#### Customisation

Tailor your client's Managed Portfolio by customising the underlying holdings to account for any specific client needs or preferences.



#### Interactive client reporting on-demand

Generate personalised reports with everything from a simple summary of account movements to performance benchmark comparisons, plus more.

#### What you need to know

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