

Individually Managed Accounts



A tailor-made solution for your clients' needs

Sanlam has an established strong capability in running discretionary services and model portfolios for intermediaries. We recognise that while no two financial advisers are the same, they all want the same things for their clients: high quality products and services from a wealth manager they can trust.

Supporting your business

We understand the pressures of managing and growing an advisory business and when it comes to investing, managing a client base that is diverse in terms of both needs and asset size is not easy. We work with financial advisers across the UK – from local firms to large national networks – and our approach is one of partnership; working with advisers to help them enhance their client proposition.

Sanlam's IMA offering through the Standard Life platform is designed to ensure that your clients' investments remain relevant as market and economic conditions change, enabling you to spend more time with your clients and managing your business.

Investment expertise you can trust

Sanlam has a strong investment culture with a clearly defined philosophy and process. When building your clients' portfolios, we draw on the firm's extensive resources and expertise, with experienced teams working across asset allocation, investment selection and risk management. These principles guide our award-winning teams as they research the global economy and financial markets, select investments, construct portfolios and monitor the risks.

We deliver the IMA service through a dedicated DFM team, Specialist Investment Services (SIS), who has considerable experience in developing and managing customised investment solutions for the specific needs of advisers and their clients. The team will work with you to construct and manage your clients' risk-profiled model portfolios. They will take into account any individual tailoring requirements such as legacy assets, substitute investments and CGT management, ensuring that each portfolio is appropriate for your clients' individual needs.

Charging structure

Our team of regional Account Directors are on hand to help you develop your centralised investment proposition through IMA. Our pricing structure is competitive and will be tailored to your business, taking into account the level of customisation you require.

Find out more

To talk to us about how Sanlam can help support your business and your clients' investment needs through IMA, please contact:

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