For adviser use only

Professional Portfolio Manager – Key features

Retirement features

Multi-goal capability
Capability to run multiple portfolios within a product to meet client retirement goals.

Natural Income
Target the natural income from model portfolios to pay to client.

Sequential trading
Avoid trade conflicts between the advised business and investment management. Conflicting trades queued to completion.

Manage portfolio drift
Payments and withdrawals used to minimise portfolio drift by aligning assets closer to target allocation.

Income
Income payments can be targeted from the portfolio taking into account any changes to asset allocation.

Portfolio features

Asset Switch
Can switch between assets without the need to rebalance the portfolio.

Reporting
Detailed model portfolio MI available at the click of a button.

Rebalance exclusion
Exclude clients from a rebalance without removing them.

Live valuations
Live look through to portfolio assets for valuations and transaction history.

Reduced trading costs
ETI trading charges of £1 per trade per client.

Mechanical rebalancing
Ability to rebalance by frequency once agreed with client.

Client view
Portfolio specific quarterly statement to track model performance and transactions.

Multi-model updates
Update multiple model portfolios with one single instruction.

Contact your SL account manager → **Complete on-boarding and governance** → **Portfolio functionality and migration training** → **Migrate assets to new model portfolios** → **Benefit from award winning model portfolio technology**

Standard Life
There's a lot to look forward to