

# MPS Direct – *benefits to you*

## Key questions

1. Do you have any legacy offshore bonds or SIPP's that hold investments you feel may not be falling in line with the Consumer Duty?
2. Are you concerned about justifying bespoke discretionary fund management ('DFM') fees for clients that aren't utilising the additional benefits and services for the additional cost?
3. Has the bespoke DFM underperformed but you don't want the headache of a pension transfer from the SIPP to a platform or with to create a chargeable event in an offshore bond?

Our direct Managed Portfolio Service ('MPS') could help you achieve consistent outcomes for your clients with a light-touch investment suitability process, alongside support for your ongoing price and value assessment.

## *Key features*

Minimum investment – £20,000

Personalised client proposal document

Full range of investments (active/hybrid passive/risk targeted/decumulation)

Competitive and simple flat fee structure – no platform fee and no VAT

Dedicated adviser support team:

- efficient turnaround times for adviser queries
- directly available by phone or email
- ISA funding facility
- support to facilitate regular and ad hoc income payments
- management of regular contributions i.e. rental income

Straightforward electronic application forms

Timely execution of setting up new accounts

Access to institutional share classes, often unavailable on platforms

Online portal access

Quarterly electronic reports/valuations

Update on client portfolios ahead of reviews, including performance/commentary

Access to tailored models for CIP/CRP partners

Comprehensive suite of SIPP and offshore bond provider partners

A solution executed with a simple strategy switch, that sits inside the offshore bond or SIPP, supported by an award-winning and dedicated adviser support team.

## Our provider partners:

### SIPPs/QROPS

- @SIPP
- Abacus Pension Trustees
- AJBell Investcentre
- Alfa Trustees
- Alliance Trust
- Alltrust Services
- Aurora Pensions
- Baker Tilly Isle of Man Fiduciaries
- BW SIPP Trustees
- Cabot Trustees
- Curtis Bank SIPP
- Concept Trustees
- D A Phillips & Co
- Denton Pension Management
- EBS Management PLC
- Embark Pensions
- Guinness Mahon Trustees
- Hanover Pension Trustees Company
- HMPP (Hornbuckle Mitchell)
- MDP Trustees
- NSS Trustees
- Options SIPP UK LLP
- Intelligent Money SIPP
- InvestAcc SIPP Trustees
- IPM Pension Trustees
- James Hay
- Legal & General
- MYSIPP
- Phoenix Wealth Trustee Services
- Premier Pension Services
- SIPP Pension Trustees
- SLA (Suffolk Life)
- Standard Life
- STM Malta
- Talbot & Muir Trustees
- Trireme Pension Services
- WBR Group (WestBridge Group) SASS
- W M Pension Trustee Services
- Xafinity

### Offshore bonds

- Aviva
- CLI (Canada Life)
- FPI (Friends Provident)
- Generali
- Hansard
- Hansard International
- Lombard
- RL360 Life Insurance Company (ex CMI bonds only)
- Utmost
- Utmost International Isle of Man
- Utmost Ireland Pan Europe dac
- Wealins SA

*“I am a big supporter of Bordier UK’s Direct MPS offering and have been for over ten years.*

*A direct point of contact within the Client Services team, online access to reports and valuations, and a speedy turnaround time for ad hoc income payments gives me the comfort of knowing that my clients are in safe hands, even when I am on holiday.*  
– Adviser firm, South West England



### Important information

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