







Technology enabled model portfolio service

ADVISER TECHNOLOGY | BRANDED MATERIALS | EDUCATIONAL RESOURCES

For each Adviser Partner we work with, we build a customised, Adviser branded web portal, fully equipped with a suite of adviser tools and tech enabled resources, adviser branded materials and bespoke client proposal packs to take much of the legwork out of the client onboarding and servicing, whilst adding maximum adviser value with clients.

THE PORTAL

UTILISING TECHNOLOGY TO HELP OUR CLIENTS, PARTNERS AND THE INDUSTRY MOVE FORWARD.

The exclusive PAM online web portal provides a range of dynamic tools to help advisers manage model portfolios more efficiently and better service their clients.





LIVE PERFORMANCE

View and export live portfolio performance stats, export adviser branded charts



PERFORMANCE PACKS

Instantaneously generated performance, holdings and overview PowerPoint and PDF packs



CIO VIEW

Access live investment views across multiple asset classes, view live changes



INVESTMENT PROPOSALS

Investment Proposals Generate bespoke client investment proposals, all adviser branded



BRANDED SUPPORT MATERIALS

Including portfolio strategy sheets, monthly and quarterly market updates



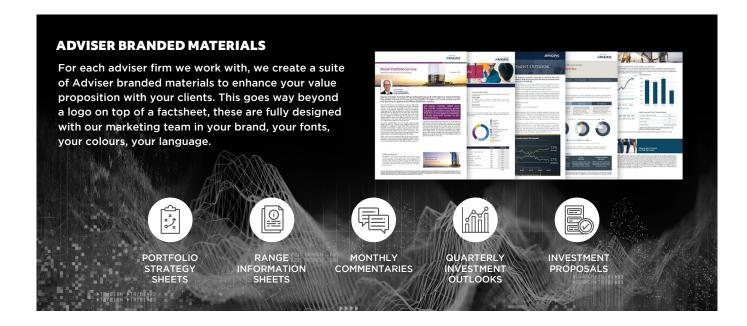
PORTFOLIO CONSTRUCTION AND REBALANCING TOOL

A range of dynamic tools to help you manage your advisory models more efficiently



FORWARD LOOKING ANALYSIS AND CASH FLOW PLANNING

Illustration of potential future performance, accumulation and drawdown tools



EDUCATIONAL HUB





For asset managers to stay relevant, it is vital we deliver not just product, but solutions, putting the power and value back in the hands of Advisers. At Pacific we work closely with all our clients to deliver great client outcomes with exceptional levels of service, as a truly 'in-sourced' investment partner.

- Ben Sears, Head of UK Solutions



PLEASE GET IN TOUCH

Pacific Asset Management 1 Portland Place London, W1B 1PN United Kingdom

Contact us T +44 20 3970 3100

www.pacificam.co.uk For more information. updates and to find out E info@pacificam.co.uk more please visit our website



IMPORTANT INFORMATION - FOR AUTHORISED USE ONLY

This document is issued and approved by Pacific Capital Partners Limited (PCP), which is authorised and regulated by the Financial Conduct Authority. This document is intended primarily for internal use, but may be distributed upon request to investment professionals and exempt investors in accordance with the FSMA 2000 (Promotion of Collective Investment Schemes Exemptions Order 2005) for authorised purposes It does not constitute advice, an offer or a recommendation to purchase or sell any financial products and you should not rely on the information in making an investment decision. The information and analysis contained herein are based on sources believed to be reliable. However, we do not guarantee their timeliness, accuracy or completeness, nor do we accept liability for any loss or damage resulting from your use or reliance upon of this document. Any opinions expressed reflect our current judgment at the date of this document and are subject to change without notice. Past performance is not necessarily a guide to future performance. This report is not directed to or intended for distribution to or use by any person or entity in any jurisdiction where such distribution, publication or use would be unlawful. This document may not be reproduced (in whole or in part), transmitted, modified or used for any public or commercial purpose without the prior written permission of PCP. Pacific Asset Management is a trading name of PCP.