

PACIFIC MODEL PORTFOLIO SOLUTIONS

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

ADVISER BRANDED MATERIALS

For each adviser firm we work with, we create a suite of Adviser branded materials to enhance your value proposition with your clients. This goes way beyond a logo on top of a factsheet, these are fully designed with our marketing team in your brand, your fonts, your colours, your language.



PORTFOLIO
STRATEGY
SHEETS



RANGE
INFORMATION
SHEETS



MONTHLY
COMMENTARIES



QUARTERLY
INVESTMENT
OUTLOOKS



INVESTMENT
PROPOSALS

EDUCATIONAL HUB



- ✓ THE JARGON BUSTER
- ✓ REGULAR WEBINARS
- ✓ 1:1 MEETINGS WITH INVESTMENT TEAMS



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



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PACIFIC
ASSET MANAGEMENT
MOVE FORWARD

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