ADVISER & CLIENT COMMUNICATIONS

REGULAR, ENGAGING CLIENT-FACING CONTENT

As part of our Individually Managed Account service, Implemented Portfolios keeps you and your clients regularly informed on economic climate, market movements and of course - investment portfolio activity.

We believe that providing consistent transparency and educating investors on the economic and investment markets encourages them to make better decisions with their wealth and create better outcomes when the market goes through particularly volatile times.

In fact, we write and send out over 62 points of investment related communications a year, branded you (your logo), on your behalf to your clients whose portfolios we manage. As well as written commentary, our communications often include helpful visual aids such as graphs, charts and tables, and educational videos.

WEEKLY UPDATE

Our Weekly update is a brief one-page summary that typically contains topical economic news and current events for the week that was, relevant information concerning your clients' individually managed accounts and any notable portfolio activity that has taken place or is planned to take place in the near future.

These updates will also contain any proposed model changes from the Asset Allocation and Investment Committee.

MONTHLY UPDATE

Our Monthly update provides a more detailed wrap-up of the global economic climate and how this may affect or is affecting markets around the world, as well as your clients' portfolios. It will also feature the views of the investment committee, providing further context and explanation on the global headlines.

These updates are usually a few pages long and also include our monthly Asset Class Tipping Points chart.

QUARTERLY UPDATE

Our Quarterly update is an extensive, several-page review of the preceding quarter, featuring an economic and investment update from our Chief Investment Officer, 10-year forecast returns, Asset Allocation targets, our Monthly Asset Class Tipping Points chart, and any other timely or relevant information from the Asset Allocation and Investment Committee.

This update delves into each asset class, briefly explaining the current view of the Asset Allocation and Investment Committee and further elaborating on any decisions to alter the weighting to any of the investments within in any given asset class.

Implemented Portfolios

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KEEPING ADVISERS INFORMED & IN THE DRIVERS SEAT

At Implemented Portfolios, we believe at the heart of our collaborative approach to managing your clients' portfolios, lies regular and frequent contact between our Investments team and you - the Adviser. That's why as part of our service, we ensure an open line of communication between Advisers, our Portfolio Management team and our Asset Allocation & Investment Committee.

We know it's imperative that you are informed of portfolio or model changes to your clients' managed accounts, and as such, we brief you on any activity or changes agreed to by our Asset Allocation & Investment Committee, before they are implemented both via our written communications as well as through the following channels -

QUARTERLY ADVISER BRIEFING

Every quarter, we provide a live virtual update on the discussions and decisions from the quarterly meeting of the Implemented Portfolios Asset Allocation & Investment Committee (AAIC) and how your clients' portfolios may be impacted.

This is your first-hand opportunity to understand the discussion and process that drives the asset allocation of your clients' portfolios, and to ask our CIO questions about global investment markets.

YOUR PERSONAL PORTFOLIO MANAGEMENT TEAM

We pride ourselves on providing a unique consultative service where Advisers have direct access to our Portfolio Management team.

During these conversations, Advisers can discuss any portfolio related queries or concerns, as well individual portfolio instructions.

DISCLAIMER

ADVISER TESTIMONIAL

Scott Jamieson, Enlightened Financial Solutions Februrary 2020

"Our partnership with Implemented Portfolios means we can rest easy knowing there is an extremely experienced group of investment professionals with diverse backgrounds and ideas managing our clients' portfolios and actively managing their asset allocation to steer clear of potential asset bubbles that are brewing.

Each client receives an EFS branded update on their portfolio every week, so they know what is happening within their portfolios.

This allows us to spend more time talking to clients about what really matters to them and their families."

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