Schroders Personal Wealth launches range of multi-asset portfolio funds

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Following the establishment of its Authorised Corporate Director (ACD) last year, Schroders Personal Wealth (SPW) is today launching its first range of portfolio funds offering clients access to a range of risk return profiles.

The SPW Portfolio Funds[1] comprise of six risk rated, multi-asset funds. Each portfolio fund is managed to a specific level of risk and combines different investments and asset types including equities, bonds and alternatives.

The new portfolio fund range builds on SPW's relationship with Schroders Investment Management and will leverage on the asset manager's considerable expertise on investment and portfolio construction. SPW will be responsible for setting the mandate and will have overall oversight for the range, whilst Schroders Investment Management will be responsible for managing the investments.

The portfolio funds, which are exclusively available to clients receiving advice through SPW, will invest mainly in Schroders funds, along with some third party funds.

SPW is committed to simple transparent pricing to ensure clients can easily see what they are paying for. There will be a capped ongoing charge figure (OCF) of 0.65%[2]

Marcus Brookes, Chief Investment Officer at Schroders Personal Wealth said:

"These are the first portfolio funds that we have launched within our new ACD so this is an exciting milestone for the company and a significant step on our journey towards becoming a top financial planning business in the UK.

The portfolio funds will allow us to support our clients in helping them to achieve their personal ambitions. Whether they're looking to invest to ultimately buy a property, fund family events, retire early or leave a nest egg to their children or grandchildren, the SPW Portfolio Funds provide extra flexibility and choice.

When combining this with the extensive range of high calibre investment expertise at Schroders, we truly believe this is another way for our Personal Wealth Advisers to help clients towards reaching their investment goals."

[1] The six portfolios are SPW Cautious Portfolio, SPW Discovery Portfolio, SPW Balanced Portfolio, SPW Progressive Portfolio, SPW Dynamic Portfolio and SPW Adventurous Portfolio

[2] Other fees are clearly explained on our website

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Note to Editors:

Schroders Personal Wealth is a joint venture between Lloyds Banking Group and Schroders – two of the UK's largest names in banking and asset management.

We were created to help more people across the UK benefit from financial advice. We have the advantage of solid foundations and a strong heritage. But we take a fresh, transparent and personal approach to financial planning.

We aim to provide clients with clarity and transparency in everything we do. This includes using technology to explain how long-term financial planning can add value to people's lives; to give people access to information about their financial wellbeing; and to communicate with their adviser when it's convenient for the client. Our heritage may be 400 years old, but our approach is built for the future.

For more information visit https://www.spw.com/

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