

19 August 2015

James Hay launches Managed Portfolio Panel

James Hay Partnership, the platform for retirement wealth planning, has announced the line up for the launch of its Managed Portfolio Panel, which is now live with seven Investment Managers.

The Panel provides a cross-section of strategies, themes, and underlying funds with each Investment Manager providing a series of investment portfolios aligned to various risk profiles and investment objectives. The funds will be selected from over 3,400 available on the platform.

At launch the Panel will comprise:

- IPS Capital
- MarketStar
- Morningstar Investment Management Europe Ltd
- Seven IM
- Smith & Williamson
- Tilney
- Vestra

James Hay will not charge customers for trades or for accessing the Panel. The only charges that will be applied are the Investment Manager's annual fee typically between 0.2% and 0.4% our standard fund platform charge which starts from just 0.18% for the first £500k and falls to 0.05% on assets over £1m and the underlying fund manager costs.

Chris Smeaton, Director of Commercial & Strategy at James Hay, said: "The James Hay Managed Portfolio Panel offers access to top end discretionary expertise at competitively priced entry levels thanks to the platform associated costs being just 0.18%. In addition, it offers a wealth of value add features which combine to ensure it neatly meets the demand from advisers for a DFM solution that enables them to retain direct client relationship, whilst maintaining the benefits of access to investment specialisms."

-ENDS-

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Notes to Editor

James Hay Partnership, the platform for retirement wealth planning, has been working with financial advisers and clients for over 30 years to administer pensions, savings and investments in a cost and tax efficient way. Today over 51,000* clients trust us to look after more than £17 billion* worth of pension and investment savings.

From the very first day we have challenged industry norms as we've responded to changing client needs - from being the first SIPP provider in the UK, through to developing our modular approach to retirement wealth planning, which we launched in 2013.

The Modular iSIPP embraces fair and flexible pricing meaning the customer only pays for what they use, while they use it. This has now been evolved through the Modular iPlan to include other non-pension wrappers such as GIAs and ISAs.

We are able to continue to innovate thanks to being part of the IFG Group, a focused financial services company specialising in the provision of independent financial advisory and administrative services.

Headquartered in Dublin, Ireland, IFG Group plc is listed on the Irish and London Stock Exchanges.

*as at March 2015

Any quotations are correct as at the date of the press release.