

## Adviser looking to manage clients on platform

AIM portfolios were traditionally held directly with a specialist AIM investment manager. However, many wrap platforms can now accommodate not only AIM shares but AIM managers who can manage AIM client portfolios on behalf of your clients via a DFM mandate. This allows client assets to remain on your chosen platform, facilitating the seamless outsourcing to a specialist AIM manager and avoiding unnecessary and time consuming administration.

Our Fundamental AIM IHT ISA Accounts and General Investment Accounts are tailored discretionary arrangements which can be accessed on a large number of platforms.

Speak to your relationship contact below to hear more.

### FOR INVESTMENT PROFESSIONALS ONLY

#### FACT!

AIM portfolios are not only available direct but can be managed via platform reducing your administration and saving you time

We are available on the following platforms:

ascentric CO INVESTOR

Standard Life Elevate

transact take control

nucleus

Standard Life Wrap

FundsNetwork™



### The Importance of IHT Planning



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### IMPORTANT INFORMATION

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