

Specialist Investment Services

Our investment expertise, built around your investment philosophy.

Your success, crafted together

Specialist Investment Services leverages our investment expertise and deep understanding advisory businesses to build a compliant investment proposition around your investment philosophy. We lift the burden of investment management from you, evolving your current advisory model and keeping you involved as you much as you choose.

As a financial adviser, your time is valuable

Every successful adviser knows that crafting an individual advice philosophy that is true to your beliefs is the first step to building a successful practice. Managing a client base that is diverse in terms of both needs and asset size is not easy. Ensuring your investment recommendations remain relevant to your clients as market and economic conditions change can become a full-time job, especially as your client base grows.

Our approach gives you more time to provide suitable advice to your clients, while making sure you continue to be fully compliant. Underpinned by thorough research and reporting, we lift the significant burden of investment management administration from your shoulders, while delivering a solution that is built around your philosophy. We'll help ensure your ability to build a sustainable practice today and well into the future.

The solution

Sanlam's Specialist Investment Services offers you the ability to give your clients the best possible investment options, all based on your advice philosophy.

We work with you to create professionally managed, risk-profiled model portfolios. We'll help you identify the most appropriate investment solutions for your clients and ensure your advice continues to meet their needs.

A long-term strategic partnership

This long-term strategic partnership provides benefits to both you and your clients:

- By drawing on our investment management expertise, you enjoy more time to spend with your clients and growing your assets under management
- We enhance your service by implementing portfolio changes simultaneously for all clients
- We manage the administrative and research involved with managing investments
- We construct tailored investment solutions aligned with individual risk profiles
- Our portfolio managers will provide ongoing support and expertise

Our insight and investment expertise

Working with us provides you with the opportunity to combine your insight and experience with the power of Sanlam's award-winning global investment expertise.

Branding

Keep your own brand to help strengthen your business. Or you can use the Sanlam brand as support or as product provider.

Discretionary permissions

We use our discretionary service to help you to manage risk and reduce costs.

Investment committee support

Our solution provides a framework for establishing portfolios and ensure the options you present to your clients are aligned to your advice and suitability processes. The result is a range of model portfolios with clearly articulated and documented goals.

You are integral to the investment committee and manager selection process. We will help you maintain the strength of your proposition, enabling you to offer it to your clients with complete confidence.

Our expertise

Sanlam's Specialist Investment Services offers you access to a wide range of expertise:

- Investment committee framework, which you'll chair so that you remain in control of all decisions
- Expertly managed white-label investment solutions, which we model precisely to your requirements
- A dedicated research team and high-quality reporting facilities along with legal and compliance support