

MyNorth Diversified Managed Portfolios

More wealth and tax efficiencies - across your clients' investment journey

Our suite of 25 multi-asset portfolios managed by AMP Investments, across 3 core strategies

1. Passive | **Grow Index, Diversified Index**
2. Active/passive core/satellite blend | **IndexPlus**
3. Active | **Research Choice Accumulator, Objectives-based and Income**



For clients

The portfolios cater to clients' evolving:

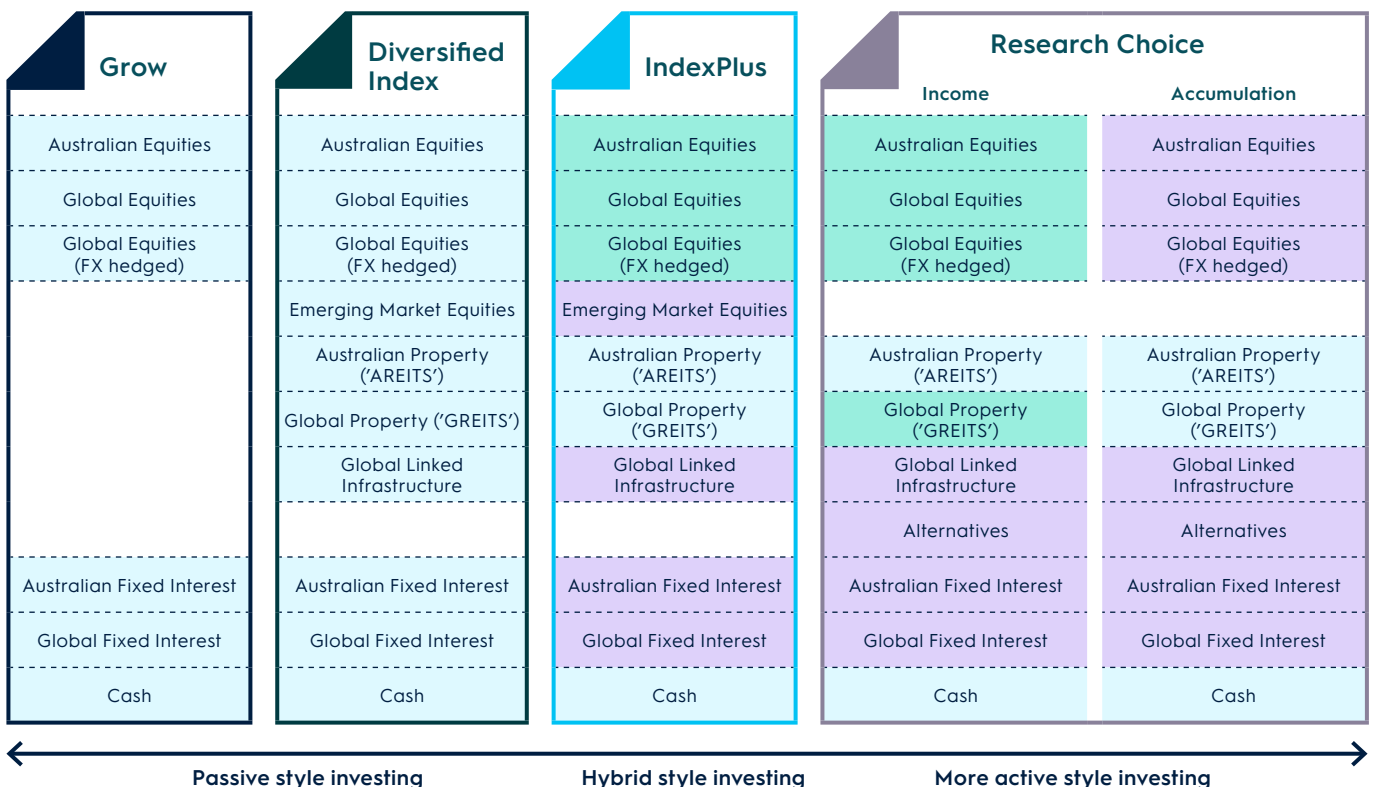
- **needs** - accumulators through to retirees
- **preferences** - multiple risk profiles and levels of sophistication
- **circumstances** - designed to minimise turnover and CGT realisation when moving within or between MyNorth Diversified MP ranges.



For advisers

They also provide benefits for you, including:

- **convenience** - off-the-shelf or part of a bespoke investment philosophy
- **efficiency** - as clients become more sophisticated or their needs change
- **confidence** - professionally managed, single investment philosophy.



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The tax benefits of managed portfolios

Tax is an often overlooked aspect of the investment journey. Inevitably, a client's goals or circumstances will evolve, prompting a need for change in their investment portfolio.

MyNorth Managed Portfolios aim to minimise the cost of moving clients between investment strategies within the MyNorth range by leveraging the benefits of common asset class building blocks. This enables an adviser to minimise a client's CGT when:

- De-risking ahead of retirement as part of a decumulation strategy
- Increasing a client's risk profile towards the start of their adviser-led investment journey
- Introducing or removing active management.

Anytime your client's goals or circumstances change, MyNorth Managed Portfolios can potentially offer a low-cost and tax-efficient way to evolve their investment portfolio.

Why North

A better way to invest

We stand for client-centric investing

North's professionally Managed Portfolios offer choice and flexibility to meet a range of goals.



A focus on technology

Technology that creates efficiencies so you can focus on providing holistic advice.



Customisation

Tailor your client's Managed Portfolio by customising the underlying holdings to account for any specific client needs or preferences.



Same-day switching

Transfer assets in or out of a Managed Portfolio with no cost.



Interactive client reporting on-demand

Generate personalised reports with everything from a simple summary of account movements to performance benchmark comparisons, plus more.



Fractional share trading

Reduce investment minimums and keep your clients in market for longer – exclusive to North.



We're here to help you so please get in touch

To find out more about how MyNorth Diversified Managed Portfolios can help your business and your clients, contact your BDM or portfolio specialist.

What you need to know

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