MPI

A STEP Member Service

Manager Information

As part of our ongoing improvements to the MPI service we have included the ability for you to add 'tags' to your listing covering any key service, client or investment specialisations you may have. You may also add in a short description for any tag you select where you would like to provide more information or clarification for trustees and other private client practitioners.

Company Name

Business Type

Please tick one box which best describes your business type.

Investment Manager	*Providing discretionary investment management services.*	
Wealth Manager	*Discretionary investment management and financial planning services.*	
Private Bank	*Wealth management and banking services.*	

Services and Capabilities

Please select any additional services or capabilities that you offer.

Execution Only	*Manager offers self-directed execution only portfolios.*	
Advisory	*Manager offers specific investment recommendations however the client makes the final decision whether to trade.*	
Lombard Lending	*Manager is able to lend against the value of the client's portfolio.*	
External Asset Manager	*Manager is able to act as an external asset manager for clients who have their own custodian bank.*	

Client Specialisations

Please select any relevant client specific specialisations you have

Charities	*Manager specializes in offering investment management services to charities and other not-for-profit organizations.*	
Institutional	*Manager specializes in offering investment management services to institutional clients such as pension funds.*	
UK Resident Non-Dom	*Manager is able to comply with investment and tax requirements for private clients with UK resident non-domiciled status.*	
US Citizens	*Manager is able to comply with reporting and investment restrictions for US citizens.*	
Tier 1 (Investor) Visa	*Manager is able to provide investment portfolios which coly with the Tier 1 (Investor) visa rules.*	

Investment Specialisations

Please indicate any relevant investment strategies you have below

Diversified	*Strategy that allocates investments across a range of diversified asset classes.*	☐
Fixed Income	*Strategy that invests in fixed income securities or funds only.*	☐
Equity	*Strategy that invests in listed equities or equity funds only.*	☐
Direct	*Strategy that invests into direct equity/bonds rather than funds.*	☐
AIM	*Strategy that invests in direct AIM companies.*	☐
Passive	*Strategy that invests exclusively into passive funds or ETFs.*	☐
Income	*Strategy which aims to generate a higher level of income through dividends and/or interest compared to an equivalent broad market index.*	☐
Absolute Return	*Strategy that aims to avoid negative real returns over the short term through the use of derivatives or other trading strategies.*	☐
Ethical	*Strategy that screens out investments on ethical grounds (e.g. no tobacco, weapons etc.).*	☐
Impact	*Strategy that invests exclusively in companies that have some direct / positive impact on social and/or environmental issues.*	☐
Sharia	*Strategy that complies with the requirements defined under Sharia Law.*	☐

Additional Information

You may also provide further information on any of the tags you have selected above. This text will appear in you listing alongside the relevant tag.

Completed By

Name		Date	

CONTACTS

Please visit:
www.mpindices.com

General Enquiries

James Hoare
Enhance MPI
Tel: +44 1534 761529
E-Mail: jhoare@mpindices.com

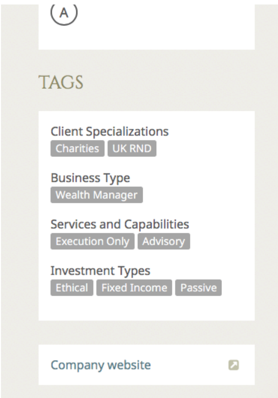
Submissions / Reports

Justin Simpson
Enhance MPI
Tel: +44 1534 761521
E-Mail: jsimpson@mpindices.com

WHAT ARE TAGS?

Tags allow you to specify any additional client, service or investment specialisation that you may have. These appear in you directory listing alongside the information you have already provided about your firm.

Eventually these will become searchable from the directory page and will allow trustees and other advisors with specific investment needs to find you more easily.



If you want to provide a little more information about any of the tags you select then you can add a short description which the user can view online when he hovers over the tag.