**Press Release**

**2 November 2020**

**TATTON ADD HUBWISE TO BESPOKE PORTFOLIO SERVICE**

Tatton Investment Management, the IFAs’ investment manager, announces that its pioneering platform based Bespoke Portfolio Service is now available through Hubwise\*

Soft launched earlier in 2020, the Tatton Bespoke Portfolio Service is the first scalable platform-based bespoke discretionary management service to be offered through investment platforms. The Tatton Bespoke Portfolio Service (BPS) breaks the perception that specific bespoke client portfolios can only be run by traditional discretionary fund managers using their own custody. This, combined with charging a market leading AMC of 0.375% (+VAT) and providing a high level of service, puts both the advisers and their clients at the heart of Tatton’s new proposition.

Tatton’s Bespoke Portfolio Service has been made possible by both regulatory and technology changes offered by Platforms which now allows for full flexibility of both investment vehicles and for the construction of client portfolios that can meet specific requirements; leaving the adviser in full control of the onboarding, cash flow management and suitability process.

Claire Bennison, Director of Investment Solutions said: “We offer both advisers and their clients real value in a marketplace that is largely wedded to old practices and higher fees. We are pleased that Hubwise have developed the technology for us to offer this service. Given the success of our soft launch we expect this service to continue to grow and offer a real challenge to a traditional marketplace due to the value in both price and service advisers and their clients can now receive.”

Angus Macdonald, CEO of Hubwise, said: “We have invested significantly in our DFM solution over the past year to deliver investment capabilities unmatched on most other platforms, features like floating models, fractional ETF trading and mixed currency models. Our close collaboration with Tatton to enable their direct and online access to bespoke client portfolios including CGT analysis, has been greatly welcomed by the advisers using our platform technology to secure the best outcome for their clients.”

**-- ENDS --**

**Notes to Eds:**

[**https://www.tattoninvestments.com/bespoke-portfolio-service/**](https://www.tattoninvestments.com/bespoke-portfolio-service/)

\*Tatton’s Bespoke Portfolio Service is also available through Transact

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About Tatton Investment Management Limited:

[**http://www.tattoninvestments.com**](http://www.tattoninvestments.com)

Tatton Investment Management Limited was launched in 2013 and is one of the fastest growing investment managers in the UK managing over £7.81 billion of assets (as at 20 October 2020).

Principally recognised for its ground-breaking Managed Portfolio Service, Tatton offers a range of risk rated portfolio strategies; active, tracker, blended, ethical and income in addition to Bespoke Portfolio Service, five-risk rated Blended Funds and AIM Portfolios. It works closely with Financial Advisers without interfering in the relationship with their clients. Believing financial advice is essential, Tatton’s portfolios are only available through Financial Advisers.

**About Hubwise Securities Limited:**

Hubwise is an FCA-regulated technology business with a clear and dedicated focus on the retail wealth market. Our multi-wrapper ‘white-labelled’ investment platform has allied modern technology, owned and controlled by Hubwise, with multi-asset execution, administration, client money and custody services to deliver scalability and high levels of process automation for our customers.

Hubwise’s strength comes from seeing things differently to the rest of the market and we’re determined to continue with that approach.