

## Charles Stanley to partner with Fairstone as its MPS provider

12 October 2023

Today, Charles Stanley, along with Fairstone, is pleased to announce a new strategic partnership whereby Charles Stanley will manage a mandate in Fairstone's Partner MPS (Model Portfolio Service) proposition alongside other leading managers.

As partners, Charles Stanley will be responsible for building and managing a customised range of risk-targeted portfolios to support Fairstone's advisers and help their clients achieve their individual investment goals. Advisers will also benefit from Charles Stanley's insights, thought leadership, market commentary and distribution channels across the UK.

Charles Stanley's MPS is based on an investment philosophy that champions an active asset allocation view, implemented using both active and carefully selected passive vehicles to ensure a competitive cost.

The investment process and philosophy is supported by an extensive research team with access to proprietary and in-depth stock and collectives research from hubs in the UK and US, which has a global reach. Investment ideas are implemented and monitored by the fund management team, led by Dan James, Head of Asset Management, and Chris Ainscough, portfolio manager and Director of Asset Management. The team's approach ensures a well-diversified portfolio with a focus on risk-adjusted returns and cost-effective implementation.

**Sean Osborne, Group Head of Sales at Charles Stanley, said:** *"At Charles Stanley our aim is to work together as partners to create a customised MPS offering that is both true to the unique investment philosophy and process of our team, as well as one that is built on the expertly managed Fairstone advice process.*

*This tailored approach means that we are able to support Fairstone's advisers with model portfolios that are well-suited to their clients' needs, as well as provide a strategic partnership that includes sharing engaging content, specialist market insights and national distribution channels, ultimately to help deliver the four outcomes of the Consumer Duty."*

**Adam Smith, Chief Operating Officer, at Fairstone said:** *"We're delighted to partner with Charles Stanley on what is a key component of Fairstone's offering. After a thorough review of the market, Charles Stanley's investment expertise and breadth of research was evident. We believe that this partnership will further support our advisers in providing added value and choice for our clients to support in the service excellence that they have come to expect from us."*

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**PRESS RELEASE**

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**About Charles Stanley**

Charles Stanley is a leading UK Investment Management Company. Its origins trace back to 1792, making it one of the oldest firms on the London Stock Exchange. It provides services direct to private clients, charities, trusts and professional institutions. It also works with financial advisers, legal, accountancy and other professional services firms, supporting them with their client objectives.

It is dedicated to providing clients with the highest standard of service and peace of mind at every step of their financial journey, delivered by over 800 staff located in 26 offices across the UK. Its services comprise:

- **Investment Management Services**, offering personal discretionary, advisory and execution-only services.
- **Asset Management**, providing investment solutions serving retail, institutional and intermediary clients, such as our model portfolio service (MPS), mutual funds and fiduciary management.
- **Financial Planning**, advising clients on how to plan their finances to meet current and future lifestyles.
- **Direct Investment Service**, an award-winning digital execution-only platform that makes investing in a portfolio of funds and shares simple and cost-effective.

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