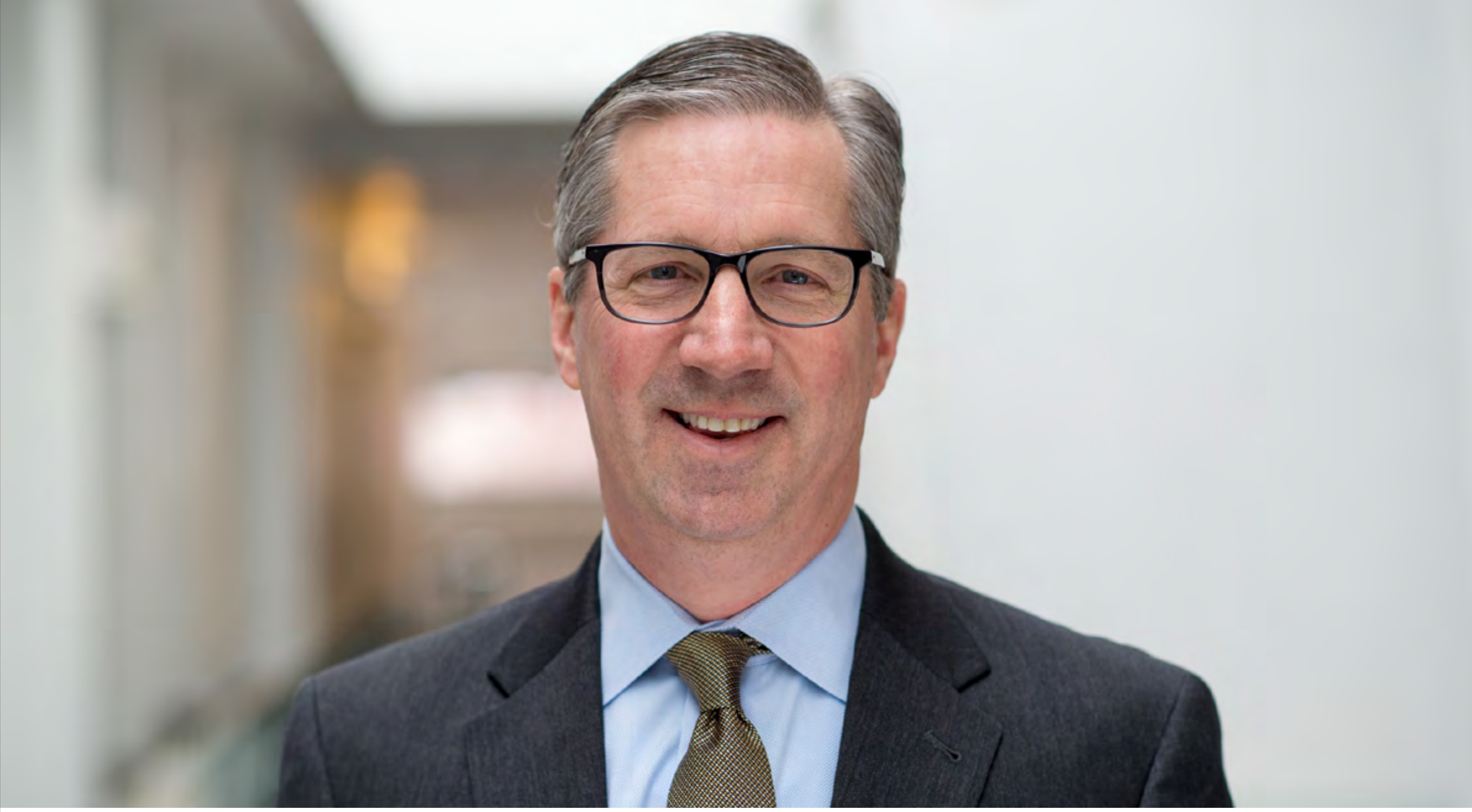
Vanguard

Vanguard Advantage Advisor Support

Helping you deliver more value to investors

VANGUARD | ADVANTAGE

“Here at Vanguard we have a very clear aim, to bring value to investors. And that is a mission we have always shared with advisers.”



Why we advocate the value of advice

Investment success, in our view, depends on four simple principles: goals, cost, balance and discipline. Good advice can be critical in helping investors to adhere to these principles.

The need for advice is growing as meeting financial goals becomes more complex. Advisers that prosper will be those that continue to deliver value to investors and offer an effective investment proposition while being able to drive down costs.

Vanguard Advantage Adviser Support is made up of four pillars, designed to offer you practical support: Research and Commentary, Professional Development, Portfolio Services and Marketing Resources.

Since 1975, we have been taking a stand for investors, aiming to give them the best chance of investment success. By partnering with you to reduce costs and improve quality, the Vanguard Advantage Adviser Support programme aims to benefit the future wealth and wellbeing of your clients.

Sean Hagerty
Managing Director, Vanguard Europe.

360 Degrees of valuable support

At Vanguard, we believe in the value of good financial advice.

Vanguard Advantage Adviser Support aims to equip you with tools and services that help to focus your attention on continuing to deliver advice to your clients, while enhancing the quality of your proposition in a way that helps to save time and potentially reduce costs.

RESEARCH AND COMMENTARY

MARKETING RESOURCES

VANGUARD INVESTMENT FUNDS

PROFESSIONAL DEVELOPMENT

PORTFOLIO SERVICES

Research and Commentary

Through our global research team, we offer you access to our latest white papers and articles covering market and economic outlooks, as well as insights into portfolio construction, capital markets, asset allocation and retirement planning.

What's more, through dedicated research – such as Adviser's Alpha and the Value of Advice – we shed new light on the key elements that underpin good advice.

Professional Development

The world of advice is forever changing. Markets move, thinking evolves and technology improves. Whatever your experience, we want to help you stay ahead and maximise your value to investors. We offer regular CPD-accredited webinars, events and workshops on a wide variety of themes, from deep dives into fixed income or strategic asset allocation to practical ideas on behavioural coaching.

Portfolio services

Our team of experts are here to help you deliver better investment outcomes. Draw on Vanguard's rich and extensive expertise to build effective, goal-oriented, low-cost portfolios. We can help you see what drives performance in different asset classes or can analyse your portfolio to identify gaps or concentrations that may need addressing. Or if you have more complex needs, we can offer model portfolio solutions.

Marketing Resources

Share in the client-facing resources that we have developed through our relationships with over 30 million investors worldwide. Our conversation starters, educational aids and product support materials aim to help you to demonstrate the value of advice to clients and to encourage good long-term investment behaviours.

Low-cost, uncomplicated investments

At the heart of the Vanguard service is a range of, low-cost, uncomplicated funds and ETFs, designed to help your clients meet their long-term goals.

Active funds

We leverage our scale and deep capabilities to access both internal and external investment talent globally that might otherwise be out of reach to the average UK investor – all at low cost and with the added benefit of Vanguard's robust oversight and due diligence.

Multi-asset funds

You can choose from a range of diversified ready-made portfolios offering low-cost, uncomplicated solutions to suit a range of risk profiles.

Index funds and ETFs

Vanguard's index funds and ETFs are designed to work as the low-cost building blocks of a diversified investment portfolio.

ESG index funds (exclusionary)

Vanguard currently offers several exclusionary ESG products across equity and fixed income that help investors to avoid certain ESG risks. These products use transparent exclusion measures to remove certain companies from the investment universe based on pre-determined ESG screening criteria.

ESG-specific active funds

Vanguard also offers active funds that allocate capital to companies based on specific sustainability criteria. The funds aim to deliver sustainable, long-term growth for investors who have a preference for active management and hope to achieve certain ESG outcomes.

Learn more about Vanguard Advantage Adviser Support

Contact us today
vanguard.co.uk/advantage
0800 917 5508
Enquiries@vanguard.co.uk

Our specialist UK intermediary team has been serving UK advisers for over 10 years. The team consists of over 20 experienced professionals based across the UK and wholly dedicated to supporting you and your business.

Tania Allerton
National Sales Manager

Find out more about
Vanguard Advantage
Adviser support programme

Call 0800 917 5508
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vanguard.co.uk/advantage

Important risk information

The value of investments, and the income from them, may fall or rise and investors may get back less than they invested.

Other important information

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This document is designed for use by, and is directed only at persons resident in the UK.

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