

How we are supporting financial advisers

Model Portfolio Service



We want you to know that we don't pay money to any financial adviser for recommending our investment services, but we do give them support in some or all of the following ways:

- We create emails, video content and materials that they can use to help with their customer communications.
- We help develop and provide third party expert reports and information on our investment services. We may also develop tools and calculators to aid their research, advice processes and business plans.
- We may hold seminars, workshops, webinars on our services, markets, and legislative or regulatory matters.
- We may contribute towards the costs of development activities which your adviser could attend.
- We may provide them with food and refreshments when they attend our business events, in line with the M&G gift and hospitality policy limits.

We do this because we believe this support will give them a better understanding of our investment services when recommending the Model Portfolio Service from M&G Wealth Investments LLP to their clients.

M&G Wealth Investments LLP will pay directly from its own resources for all research received from third parties in connection with the provision of investment services.

In addition to this, M&G Wealth Investments LLP may also receive commentary and analysis free of charge from third party experts in line with the M&G gifts and hospitality requirements, to help us to develop investment strategy and to manage the risk within our model portfolios.

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