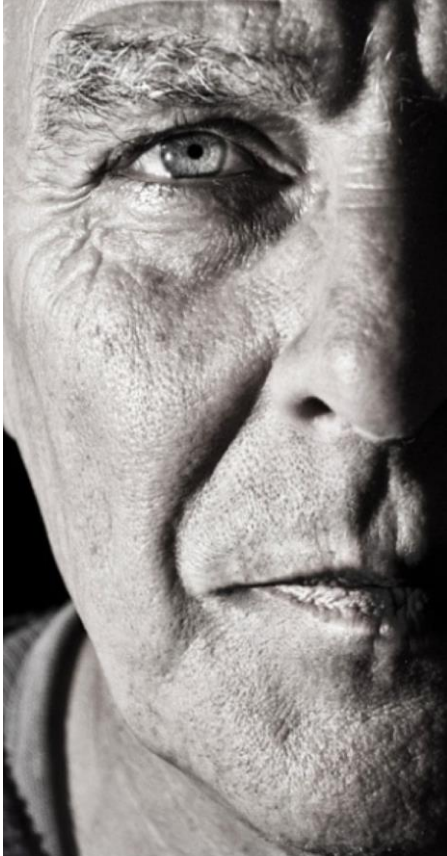


Alpha Beta PARTNERS Lifetime



The Alpha Beta Lifetime Portfolio is designed as a core holding for long term investors wishing to avoid the worst market drawdowns. The systematic investment process is academically backed and developed in conjunction with Whole Money, Professors from City Business School and managed by Alpha Beta Partners.

Key Features

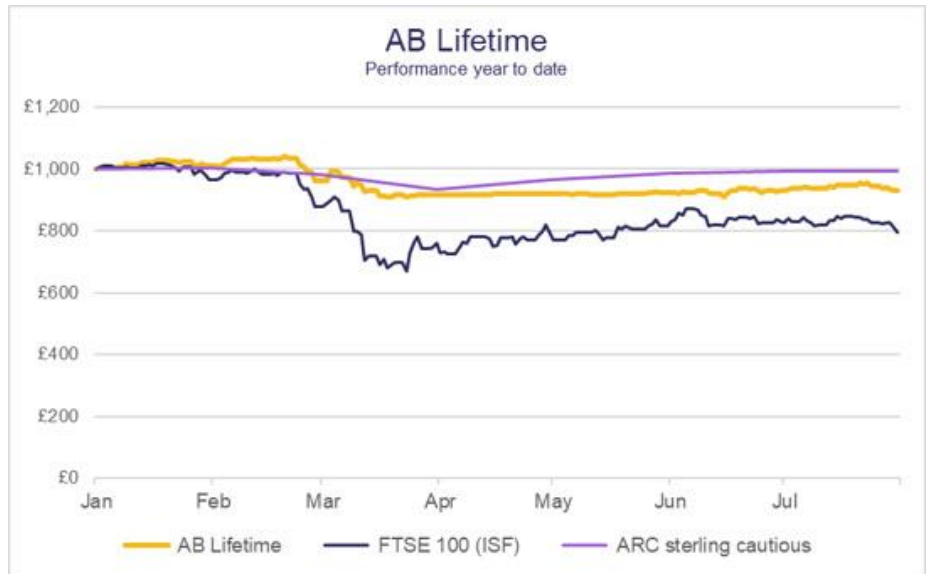
- The Lifetime Portfolio uses a systematic investment process to smooth returns for investors.
- Lifetime Portfolio mitigates the effects of sequence risk by automatically moving to cash in market downturns.
- Designed as a core holding, Lifetime portfolio has an important role in accumulation and decumulation investment strategies.
- The Lifetime Portfolio is well priced, transparent, and fully liquid.
- Exclusively available to professional advisers on multiple platforms.

Fees	
Management fee (inc. VAT where applicable)	0.40%
Ongoing charges figure (OCF)	0.12% (costs vary)
Total Product Cost	0.52%



Designed as a fully transparent and liquid model portfolio the Lifetime investment strategy moves systematically into cash when markets turn lower. The academically proven investment process is robust and tested over multiple decades – with good results. When fully invested, the Lifetime portfolio provides the potential for strong returns over the medium term, always guarding against the possibility of a heavy market fall.

Suitable for investors approaching, or in retirement needing to avoid sequence risk, or those wishing for a smoother investment return from their savings.



Source: Whole Money

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Important Information

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