

## Description:

The King & Shaxson “Platform Ethical Portfolios” are designed to provide IFAs with a comprehensive ethical investment solution on a range of investment platforms.

The five portfolios cover a wide range of investor risk profiles and objectives, from “Cautious” (focusing on capital protection), to “Adventurous” (catering for those with a high appetite for risk). The “Income” portfolio aims to provide an attractive level of income from a balanced range of assets.

The portfolios provide a solution that is as simple as investing in a single fund, but with the added benefit of active management across all asset classes and risk objectives. The IFA retains control of the client’s assets whilst King & Shaxson provide ongoing investment management.

These portfolios are currently only available of the Novia platform but the portfolios are in the process of being made available on other platforms. Ask us about your chosen platform to see how we can work with you and your platform provider.

## Fees:

0.50% + VAT  
+ Platform Charges  
+ Underlying Fund Charges

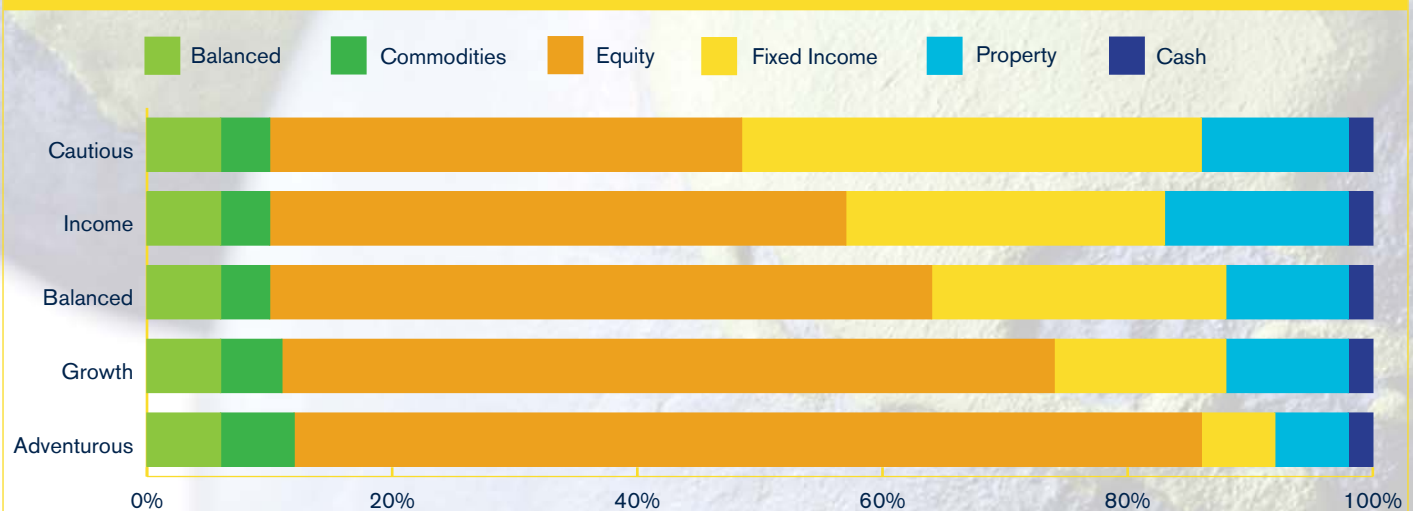
## Indicative Portfolio Underlying Fund Charges (Novia):

Cautious	0.67%
Income	0.70%
Balanced	0.72%
Growth	0.74%
Adventurous	0.77%

## Indicative Performance\*:

	Cautious	Income	Balanced	Growth	Adventurous	FTSE All Share	FTSE Corp Bond
1 mth	-0.9%	-1.1%	-1.1%	-1.7%	-2.2%	-4.5%	0.8%
3 mths	-2.8%	-2.8%	-3.7%	-4.9%	-6.0%	-11.6%	1.5%

## Asset Allocation\*:



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Please remember that the value of investments and the income arising from them, may fall as well as rise and is not guaranteed. You may not get back the amount invested, especially in the early years. Investors should be aware of the underlying risk associated with investing in shares of small-cap stocks and emerging markets. These can prove to be more volatile than in more developed stock markets. Derivative instruments may be used from time to time for the purpose of efficient portfolio management.

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