

Demo Financial Planning Managed Portfolio Service

Professional investment management,
shaped around you

Client brochure

Powered by



A simpler way to invest

As a client, you want to feel confident that your money is being looked after properly, and that any solution recommended is right for you. That's exactly what Demo Financial Planning's Managed Portfolio Service (MPS) is designed to achieve.



Personalised solutions

We work to understand your goals and risk appetite, then recommend the ideal Demo Financial Planning MPS portfolio.

Professional investment management

That portfolio is then expertly managed by our investment partner, AJ Bell Investments.

Total peace of mind

You'll get regular updates, and the reassurance of working with a FTSE 250 company.

Close relationships, with you at the centre

- ▶ We recommend the right portfolio for you.
- ▶ AJ Bell Investments manages it on an ongoing basis.
- ▶ We stay alongside you as your adviser, every step of the way.



Personalised solutions

Choosing the wrong investments can be a costly mistake. With the Demo Financial Planning Managed Portfolio Service, you'll never be left to navigate tough investment decisions alone.

Looking after you

You've already built a relationship with your adviser. It's their job to understand your circumstances, clearly explain your options, and recommend the portfolio that's right for you.

Looking after your portfolio

Behind that advice sits the professional investment team at AJ Bell Investments. They're the people who'll carefully manage your chosen portfolio on an ongoing basis.

The best of all worlds

- ▶ A trusted adviser who knows you.
- ▶ An experienced investment team looking after your portfolio.
- ▶ Ongoing support from the team at Demo Financial Planning.

Relax, knowing you have an MPS portfolio that will:



pursue your specific investment goals...



within the timeframe you're working to...



at a risk level you're comfortable with.

Professional investment management

Choosing investments is time-consuming and difficult work. Markets move, there's a huge amount of choice, and knowing what changes to make is never straightforward. In short, it's a job for experts – and we work with some of the very best.

Meet the AJ Bell Investments team

The Demo Financial Planning MPS is powered by AJ Bell Investments – an award-winning team with more than 100 years' combined experience of building and managing effective investment solutions.



Ryan Hughes

Managing
Director



Citywire's Wealth
Manager Top 100 2023



Ian Aylward

Head of
Investment Partnerships



Investment Week Leader 2026

Citywire's Leading Fund
Selector in the UK
2023 and 2021

Citywire's Wealth Manager
Top 100 2025 and 2021



Paul Angell

Head of
Investment Research



Investment Week Leader
2026 and 2025

Citywire's Wealth Manager
Top 100 2025 and 2024

Why clients value this service

It's managed for you



Experienced professionals make the decisions, taking a disciplined approach to managing risk and opportunity over time.

It stays under review



Your portfolio is monitored on an ongoing basis, with changes made when needed to keep it aligned to its purpose.

It spreads risk



Your money is diversified across a range of holdings, helping to avoid over-reliance on any one investment or market.

Total peace of mind

Clear, timely communication is vital to your peace of mind, so we'll ensure you receive regular updates on your portfolio and its performance.

You'll also want reassurance that your investments are being handled by a strong, reputable partner, so here are a few key points to remember about AJ Bell Investments.



Part of a company you can trust

A respected FTSE 250 company, trusted by over 723,000 customers.



A credible and experienced team

Currently looking after over £9.8 billion of assets under management.



Award-winning expertise

Design and manage MPS portfolios with a proven track record of performance.



Professional Adviser Awards 2026

Best Bespoke MPS Provider

Citywire Investment Performance Award

Best Growth Portfolio (2023, 2024, 2025)

Money Marketing Awards 2024

Best Investment Solutions Provider

What happens next?

- **Your adviser will recommend** a portfolio based on your needs.
- **AJ Bell Investments will manage** the portfolio on an ongoing basis.
- **We'll keep it under review with you** as your circumstances and goals evolve.

Important information

The value of investments can go down as well as up, and you may get back less than you invest.

This brochure is for information only and does not constitute personal advice or a recommendation to invest. Your Demo Financial Planning adviser will confirm whether this service is suitable for your personal circumstances.

Demo Financial Planning Ltd is authorised and regulated by the Financial Conduct Authority.