**Manulife** Investment Management

# *Simplify* your practice: Manulife Investment Management Know your product (KYP)

## Advisor support

At Manulife Investment Management, we support advisors by helping to simplify your practice and streamline your client portfolios.

**Using industry-leading analytical tools, our wholesaling teams can:**

- better understand your book of business.
- identify weak spots in your portfolio holdings.
- provide guidance on using asset allocation as a solution in your practice.
- think about your portfolios more critically.
- assist with building efficient and resilient client portfolios.
- provide direction on the importance of model portfolios.

**Manulife Investment Management wholesalers are available to consult with you to:**

- provide fund comparisons, as well as overlap and correlation analysis.
- provide detailed objective analysis on key factors such as:
  - environmental, social, and governance (ESG) investment factors.
  - upside/downside capture.
  - risk/return.
  - tracking errors.
  - fee comparisons.
- provide hypothetical illustrations that use benchmarks to show how portfolios perform over multiple timeframes.
- identify gaps with portfolio managers who may have under-delivered on their stated objectives, and suggest alternatives or complements.
- provide comprehensive KYP packages for your Manulife Investment Management mandates.
- provide case-specific demonstrations, illustrating income needs and tax considerations.
- evaluate tax efficiency of portfolios.

## Our three-step process

While working with you, our wholesaling teams will follow a three-step process:

**01**

**Discovery meeting**

Gain an understanding of your investment philosophy, asset allocation, and business model, as well as fund holdings.

**02**

**Fund analysis**

Provide an objective/unbiased deep-dive analysis with focus on identifying areas of strength and weaknesses in your selected holdings.

**03**

**Recommendation and ongoing support**

Offer recommendations to your current holdings based on fund analysis and investment philosophy.

Provide KYP packages for Manulife Investment Management mandates in your portfolio.

Give you ongoing support (and scheduled business reviews) to help you streamline and manage your business.

## For advisor use only



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