Redefining Investment Management for Financial Advisers

A Smarter Approach to Growing Your Business
Take Control. Elevate Client Outcomes. Build a More Valuable Firm.

At Apollo Multi Asset Management, we believe financial advisers deserve more than off-the-shelf investment solutions. Instead of outsourcing to large, impersonal DFMs, our partners take ownership of their investment proposition, shaping it to fit their clients' needs while benefiting from a new revenue stream and greater business value.

We provide the infrastructure, expertise, and regulatory framework, enabling firms to establish their own bespoke asset management company—without the operational complexity.

Why Work With Apollo?

A Tailored Investment Proposition Aligned With Your Firm
Traditional DFMs offer rigid, one-size-fits-all solutions, limiting advisers' ability to customise portfolios to meet client needs. Apollo's model puts you in control. Together, we design an investment proposition that reflects your firm's philosophy, client demographics, and long-term vision, ensuring a seamless alignment between advice and investment outcomes.

Increase Revenue and Build Business Value
Rather than directing client assets to third-party DFMs, advisers partnering with Apollo create a sustainable new income stream through revenue-sharing. By co-owning the investment process, your firm strengthens its financial position, enhancing enterprise value while delivering a better client experience.

Regulatory Confidence Without the Complexity
Becoming a discretionary manager independently can be daunting. Apollo provides the FCA-regulated structure, compliance oversight, and operational support, allowing you to focus on client relationships and investment strategy without the burden of managing an asset management company alone.

A Competitive Edge in a Crowded Market
Clients value a service that is personal, transparent, and actively managed. Standing out in today's landscape means offering something more than a generic DFM model. Our tailored approach helps you differentiate your firm, enhancing client trust and retention.

Who Benefits From This Partnership?

Our model is designed for forward-thinking financial advisers and wealth managers who want to:

- Move beyond standard DFMs to offer a bespoke investment solution.
- Establish a new revenue stream and build long-term equity value.
- Improve client outcomes with a more transparent and tailored investment approach.
- Stay ahead of regulatory scrutiny with a compliant, well-structured investment service.

How Our Partnership Model Works

Discovery & Design
We work closely with you to understand your firm's needs and develop a tailored investment proposition.
Structure & Implementation
Apollo establishes the asset management entity under our regulatory framework, handling compliance and operational requirements. You retain influence over investment strategy and decision-making.
Revenue & Growth
As assets under management increase, so does your share of revenue, enhancing profitability and business valuation.
Ongoing Collaboration & Support
We provide marketing materials, portfolio reporting, and strategic insights, ensuring a seamless client experience.

A Regulatory-First Approach to Investment Management

With increasing scrutiny on Model Portfolio Services (MPS), the FCA is focusing on governance, cost transparency, and client outcomes. Apollo's model ensures compliance with key regulatory expectations, including:

- **Governance & Oversight** – Clear accountability and due diligence in investment decisions.
- **Cost Efficiency & Value for Money** – Transparent pricing with no unnecessary fee layering.
- **Client Suitability** – Investment solutions aligned with specific client segments.
- **Performance Benchmarking** – Transparent reporting that meets regulatory standards.
- **Operational Resilience** – A robust framework that safeguards both advisers and clients.

Why Now? The Opportunity for Advisers

Establishing discretionary investment capabilities has traditionally been a complex and costly endeavour, but Apollo's partnership model makes it simple and accessible. Many advisory firms are recognising the value of taking control of their investment proposition, not only for client outcomes but also for the long-term financial health of their business.
By transitioning from an IFA to a discretionary investment firm, you gain greater flexibility, strengthen client relationships, and enhance revenue potential. Whether your goal is to build a distinctive brand, optimise client costs, or future-proof your business, Apollo provides the platform and expertise to make it happen.

Take Ownership of Your Future With Apollo

We are committed to forming deep, strategic partnerships with select financial advisers who share our vision for a smarter, more client-focused investment approach. If you're ready to differentiate your firm, drive new revenue, and deliver superior client outcomes, let's start the conversation.

Contact us today to explore how Apollo can help you shape the future of your business.

APOLLO MULTI ASSET MANAGEMENT

Absolute Vision: A Smarter, More Resilient Way to Invest

At Apollo Multi Asset Management, we believe in Absolute Vision—the ability to see beyond short-term market noise and invest with clarity, conviction, and discipline. The financial world is evolving, and traditional investment models are no longer fit for purpose. The once-reliable 60/40 portfolio—built on the assumption that bonds will always hedge equity risks—has failed to deliver real returns in an era of inflation, rising interest rates, and geopolitical uncertainty.

Apollo stands apart as a firm built for the future. We are not bound by benchmarks or outdated conventions. Instead, we take a forward-thinking, multi-asset approach alongside absolute return investing—targeting consistent, risk-adjusted performance throughout the full market cycle.

Founded during the 2008 financial crisis, Apollo has consistently demonstrated the ability to thrive in uncertainty—because we see what others don't.

Expert minds, unconstrained thinking

Apollo Multi Asset Management's expertise is built on decades of hands –on experience across investment management, proprietary trading, and navigating financial markets through multiple cycles.

Steve Brann
Chief Investment Officer
35 years experience

Ian Willings CFA
Partner & Portfolio Manager
23 years experience

Joanne Baynham CFA
Global Investment Strategist
25 years experience

Emily Thomas Adderson
Assistant Portfolio Manager
20 years experience

For professional advisers only

Please remember that the value of your investment may fall as well as rise and is not guaranteed. You may not get back your initial investment. Past performance is not an indicator of future performance. Nothing in this document should be construed as investment advice.

If you require investment advice you should contact an authorised financial adviser.

Apollo Multi Asset Management is authorised and regulated by the Financial Conduct Authority (FCA Number: 487458).

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