



T.RowePrice

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Mattioli Woods selects T. Rowe Price to develop income model portfolio

Mattioli Woods, the specialist wealth management and employee benefits business with over £15 billion in assets under advice and administration, has selected the global asset manager, T. Rowe Price, to develop and advise on an income-orientated model portfolio for clients. The portfolio capitalises on the exciting opportunity set available in income producing assets, following a prolonged period of low interest rates and yields.

Mattioli Woods offer a broad range of investment solutions to suit the changing needs of its clients. Whether they are looking for a diversified portfolio, a bespoke strategy, or a specialist fund, Mattioli Woods has the expertise and experience to help clients achieve their financial goals. The creation of the income portfolio will complement existing income strategies, such as Custodian REIT, Property Securities Fund, and Income Structured Products. Additionally, the portfolio can sit alongside our range of risk-rated multi-asset portfolios and forms part of a strategic plan to provide access to a wider range of investment options.

The collaboration is also an important step for T. Rowe Price as it looks to deepen its footprint within the UK.

T. Rowe Price was established in 1937 and clients have come to rely on the award-winning firm for its retirement expertise and active management approach to equity, fixed income, alternatives, and multi-asset investment capabilities.

Yoram Lustig, Head of Multi-Asset Solutions EMEA and Michael Walsh, Multi-Asset Solutions Strategist at T. Rowe Price will be the investment advisers for the model portfolio. They will work with the Mattioli Woods investment team, including Dean Cheeseman, Managing Director of Client Investment Solutions.

Dean Cheeseman, Managing Director of Client Investment Solutions, said: "We selected T. Rowe Price for their collaborative approach and focus on delivering great client outcomes, something which is increasingly important in the evolving savings and retirement market. From their US heritage, T. Rowe Price has extensive experience in multi-asset and retirement solutions. Through our partnership, our clients will benefit from the combined experience of Mattioli Woods in financial advice and the global asset management experience of T. Rowe Price."

Nat Terry, Head of UK and Ireland, T. Rowe Price said: "We are excited to begin this partnership with Mattioli Woods to develop products for their advisers and clients. T. Rowe Price's global investment experience will support Mattioli Woods' investment team and consultants to provide investment solutions and support them in growing their business."

This collaboration is an important step for T. Rowe Price as we continue to build our UK business providing customised solutions for investment advisers.”

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NOTES TO EDITORS

ABOUT MATTIOLI WOODS

Mattioli Woods is a leading UK provider of wealth management and employee benefits with offices across the country, we are growing both organically and by acquisition to deliver strong, sustainable shareholder returns over the long term. We administer over 11,000 clients and hold over £15.3 billion of assets. We pride ourselves in building long-term relationships to provide trusted advice, high standards, and a personalised delivery.

ABOUT T. ROWE PRICE

Founded in 1937, T. Rowe Price (NASDAQ: TROW) helps people around the world achieve their long-term investment goals. As a large global asset management company known for investment excellence, retirement leadership, and independent proprietary research, the firm is built on a culture of integrity that puts client interests first. Investors rely on the award-winning firm for its retirement expertise and active management approach of equity, fixed income, alternatives, and multi-asset investment capabilities. T. Rowe Price manages USD\$1.35 trillion in assets under management as of September 30, 2023, and serves millions of clients globally. News and other updates can be found on [Facebook](#), [Instagram](#), [LinkedIn](#), [X](#), [YouTube](#), and troweprice.com/newsroom.

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