Client Scenario › Advice and Solution Map

Helping advisers align portfolio solutions to client priorities

Russell Investments

Priorities	Typically suited to clients who	Portfolio objective	Adviser conversation themes
1 Core growth clients	Want a professionally managed core portfolio Are seeking long-term growth Value diversification across asset classes	Deliver consistent long-term growth through diversified multi-asset exposure.	Core portfolio foundation Diversification Governance
2 Cost-conscious clients	Are focused on cost efficiency Prefer broad market exposure Value transparency and simplicity	Provide efficient market exposure through a lower-cost index-based solution.	Cost efficiency Market exposure Transparency
3 Values-aligned clients	Want investments aligned to personal values Prioritise sustainability considerations Are seeking long-term wealth creation	Build long-term wealth through a diversified portfolio that integrates sustainability considerations into investment decisions.	Values-based investing Long-term investing Responsible investing
4 Growth-oriented clients	Have higher growth objectives Are comfortable with increased risk Have longer investment horizons	Enhance long-term growth potential through geared market exposure.	Growth acceleration Long-term wealth creation Risk awareness
5 Diversification-focused clients	Want exposure beyond traditional asset classes Are seeking differentiated return sources Have longer investment horizons	Enhance portfolio diversification through access to private market opportunities.	Alternative return streams Portfolio resilience Long-term investing
6 Income-focused clients	Require regular income generation Are approaching or in retirement Prioritise stability and cashflow	Support retirement income generation while maintaining exposure to long-term growth.	Income generation Portfolio defensiveness Retirement support

Consistent implementation
Map solutions across client segments

Stronger Governance
Maintain robust oversight and control

Simplified Transitions
Streamline execution with confidence

Better outcomes
Drive stronger, more consistent client outcomes