Case Study: Bespoke Portfolio Service

Background:

Property investor looking to diversify his portfolio and meet a fixed income requirement → Investable assets £500,000 → SIPP £400k / ISA £100k

Challenges faced:

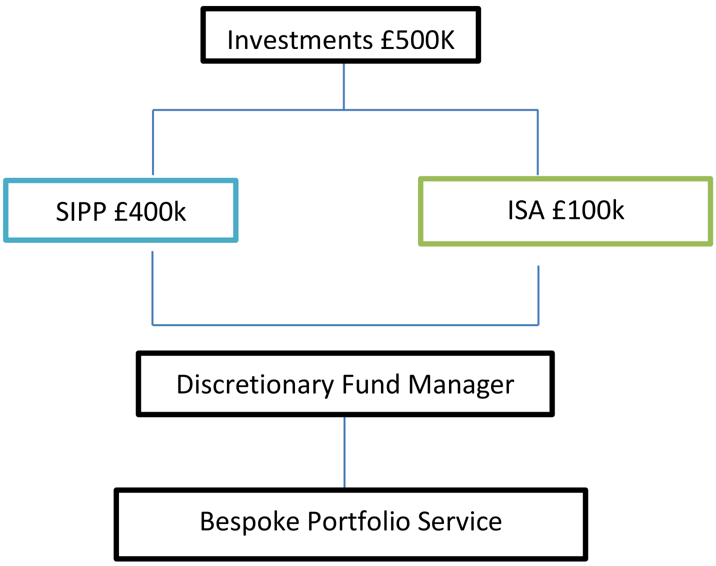
- Limited liquidity in existing property portfolio
- Requires income of 5% p.a. to meet shortfall in disposable income
- Potentially needs access to capital for future family commitments / emergencies
- Astute investor looking for high service level, tax efficiency and diversified portfolio

Actions:

- Determine tax-efficient structure for the client’s investment portfolio
- Appoint investment specialist to generate portfolio returns of 5% p.a. (net of fees)
- Develop bespoke investment strategy that meets income requirements and adheres to client’s attitude to risk and capacity for loss

Outcome:

- Simplified transparent arrangement (online valuations, client meetings)
- Diversified portfolio created to accommodate clients specific circumstances (no property exposure)
- Tax efficient investment structure
- Client benefits form high level of service and flexibility in the event of changing circumstances
- Receives monthly market updates, strategic changes and portfolio reviews



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