

Background:



Challenges faced:

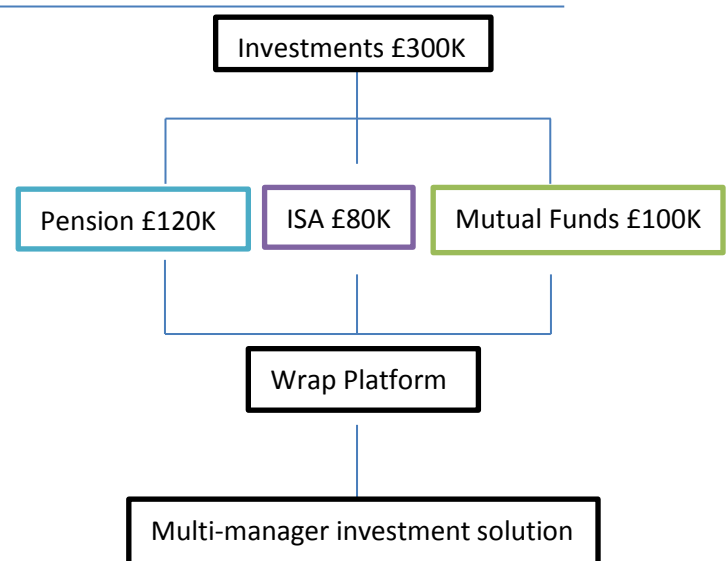
- No identified investment goals or expectations
- No quantified attitude to risk
- No consistent investment strategy
- Volatile returns (Individual asset class managers cannot excel in all markets, at all times)
- Administrative burden (difficult to ever know precise valuation)

Actions:

- Quantified Attitude to Risk and established investment goals
- Developed bespoke investment strategy
- Use of Wrap platform to enable consistent investment strategy across all tax wrappers
- Use of Multi-manager solutions to increase diversification and portfolio flexibility

Outcome:

- Simplified, transparent arrangement (online valuations, 24 hours a day)
- Removal of inflexible/inconsistent investment strategy
- Ability to maximise tax efficiency across investments each year
- Blend of manager approaches and investment styles
- Increased diversification (aim to reduce volatility of returns)
- Potential for better returns in line with quantified attitude to risk



Vintage Wealth Management Limited

Telephone 020 8371 3111
 E-mail info@vintagewealth.co.uk
 Web www.vintagewealth.co.uk
 @Vintage_Group