Wealth Management Service

What is the Wealth Management Service?

The aim of the Wealth Management Service is to combine financial planning with effective investment management. This service is aimed specifically at high net worth clients who require active advice on their investment and pensions portfolios, and a close relationship with their adviser.

We are here to help you make informed decisions about your financial future. In order to do this your financial adviser will work with you to build a clear and detailed understanding of your current and future financial requirements, your investment needs and your attitude to risk and return.

We provide clear and comprehensive reporting of what is happening within your portfolio in terms of investment performance and portfolio changes. You will receive a portfolio valuation every six months, with online valuations available daily through our secure web site.

Throughout the year we will monitor your investments to ensure they continue to meet the appropriate selection criteria. Where we identify a fund that should be sold, we will write to you advising you to move your money into a different fund. If the fund change would incur capital gains tax, we will raise this issue at your annual review meeting.

To ensure that your financial plan is working for you we will provide you with an annual review report. This means that we will meet with you each year to review your financial objectives we can then recommend any alterations that may be necessary.

What is included in the service?

- File Administration
- Portfolio valuation half yearly
- Online valuation available
- Annual Review Report including meeting
- Recommendations of fund changes as appropriate
- Dedicated points of contact: Consultant and administrator
- Work with / recommend professional advisers as required
- Any additional services charged separately

The Roberts Partnership

For a free consultation call us on 0161 835 2266