

Wright, Johnston & Mackenzie LLP



Investment Management Service



Over the years, investors often accumulate a motley collection of funds and assets. Managing these investments can be a time consuming, paper-laden process where opportunities are overlooked and chances missed.

Successful investment management requires time, knowledge and experience – and that’s where WJM can help.

Our Investment Management Service matches your investment portfolio to your risk profile, and within these parameters we seek to generate superior returns for you. In addition, we take away the day-to-day headache of managing your own investments and dealing with the associated paperwork

Our Investment Management Service is proactive, and we will regularly update and advise you on your investment portfolio. Our investment professionals continually analyse funds and look for opportunities for you. This ensures our Service is flexible enough to meet most investment needs, with little or no restriction on asset choices.

As a result your investments are continually reviewed and, if we believe changes should be made, we will contact you rather than waiting until a review is due.

Our service is fee based, and we will agree fees with you up-front, so there are no surprises.

Investment Management Service: We actively monitor your portfolio and make recommendations but we only act on receipt of your instruction. Investments can be held by our Nominee company and you will benefit from full supporting investment administration, including regular valuations.

The benefits include:

- Annual meeting to review your affairs
- Ongoing investment advice
- Proactive investment review process
- Valuations every 6 or 12 months
- Reduced paperwork
- Optional safe custody service – with annual report
- Competitive fees



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When you use our Investment Management Service you are in safe hands. We've been managing investment portfolios for clients for many years and, through our Investment Management Service, we manage over £100m of clients' funds. We're also fully regulated by the appropriate authorities.

Investment Dealing Service: If you do not want our full Investment Management Service we can, when requested, advise you on the merits of an investment. We will also provide valuations on request.

Our services are not limited to your investments – we can also manage your pensions, other investments and keep track of your life insurance policies.

For more information please contact:
Hazel Murray: hlm@wjm.co.uk

WJM's Investment Management Service is a service within our Personal Wealth Planning Service.

More details can be found at
www.wjm.co.uk

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