Bringing a blend of art and science to investment management

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INVESTMENT

Our approach to fund management is to perfect the blend of art and science, alongside experience and innovation. Our aim, quite simply, is to build and preserve the wealth of our clients.

The science

We observe the highest standards of corporate governance, assessment and risk profiling of our clients to create the most suitable risk managed models and bespoke portfolios. Our fund selection process has six distinct parts and these drive the buy, sell and hold decisions in the portfolios. This is how our investment team blends different funds to support the long-term interests of you, the investor.

We develop a longer term strategy to suit your requirements. However, the team will from time to time allocate assets on a tactical basis to take advantage of any shorter term movements in markets. Whilst our strategic asset allocation is reviewed annually, our tactical asset allocation changes over time, giving us the flexibility to achieve your investment objectives. We have an asset allocation committee which meets monthly and its views are particularly valuable during times of market volatility.

The art

We believe in the value of long-term investment and thoroughly research the funds and asset classes that we feel are suitable for our clients. We look to gain a rounded understanding of how the fund aims to achieve its objective, the process used to achieve this and the people entrusted to invest our clients' money.

One thing we do not do at Beaufort Investment Management is make impulsive decisions. We tell our clients what we are thinking, what has happened in markets and explain why we have bought or sold an investment.

We believe this element is more of an art form. However, our philosophy is a blend of both art and science.

We believe in diversification across asset classes and asset types as this tends to reduce the volatility of the overall portfolio return. Picking active managers who can outperform in the future requires a deep understanding of the business, investment philosophy and process. Our research process is rigorous. This helps us to understand if the returns are from managers' skill or just market exposure, and whether we consider this skill is sustainable.

Given our rigorous selection process, we have a notable preference for 'glass boxes' rather than the less transparent 'black box' type strategies which enables us to communicate our deep understanding of the investment, its philosophy and the process much more easily to our clients.

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Our range of model portfolios – blending art and science

We have a range of model portfolios which include:

Passive – using our strategic asset allocation we build a range of risk graded portfolios that will deliver market-like returns, using the main indices for the underlying asset classes. These are designed to track the markets, both up and down, delivering a competitively priced solution for those investors seeking to mirror the stock markets.

Enhanced Passive – using the core funds from our passive range, we enhance the proposition with additional sector or specific passive funds, which we actively select to match our current tactical asset allocations. These portfolios are designed to deliver an enhanced market-like return.

Equip – our range of actively managed multi-asset model portfolios. This means we select the funds we feel appropriate for your attitude to risk and build a portfolio for you. We also offer two income portfolios, generating sustainable and high income. These portfolios are designed to deliver long-term returns that are different from the markets, which will mean a level of deviation from our passive ranges over both the short and long-term, as we seek to outperform the market.

Ethical – a portfolio of investments that combine socially responsible, ethical and environmental considerations with a strategy for long term capital growth. All funds in this sector are independently monitored for consistency in their ethical and environmental credentials.

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Risk management and due diligence

Your adviser knows your appetite for risk or otherwise. He or she will guide you through our terms of business and will explain our approach to what we call 'active' as well as other 'passive' strategies.

We have our own robust in-house investment process. Your adviser will carefully assess your attitude to risk and capacity for loss, and this will be matched to our strategic asset allocation.

We have an independently chaired Investment Governance Committee who ensure that our investment guidelines are strictly adhered to. The Group has an independent audit and risk committee and industry leading Non-Executive Directors on its boards.

Exceptional client service

We have an open and transparent approach to building and preserving the wealth of our clients. Our fees, which are amongst the most competitive in the market, are clearly explained to you by your financial adviser from the outset.

Our industry-leading communications ensure that you are kept up-to-date, with weekly bulletins providing market and economic updates published by our investment management team. We publish comprehensive performance reports throughout the year, the findings of which are presented to your financial adviser, followed by an interactive Q&A session. Regular valuations are also issued to you, including a commentary on current market conditions and an update on the performance of the underlying investments, so you can keep track of how your funds are performing.

Come and meet us

We would be delighted to meet you, to explain our investment philosophy and how we create portfolios specifically for you. Please ask your financial adviser to invite you to one of our investment seminars, where we'll update you on performance, market intelligence and give you the opportunity to pose questions to the Beaufort investment team.

For more information, please call:
0345 241 5376 (calls charged at local rates)

Or visit:
beaufortinvestment.co.uk

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Beaufort Investment Management is a discretionary fund management firm, with close to £1bn under management invested in over 40 model portfolios that are traded in the UK and globally, on behalf of private and corporate clients as well as trusts and charities.

First established in 2004, Beaufort's range of actively managed and risk-graded portfolios are offered to investors via independent financial advisers who wish to enhance their clients' returns and preserve their wealth. They want the best possible outcome for their clients and trust in the accountable, professional, knowledgeable experts in our team at Beaufort Investment Management, a team which has over 100 years' collective experience bolstered by fresh, analytical methods.

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Call today to arrange an appointment with a financial adviser in your area

0345 241 5376

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The content of this brochure is for information only. It is advisable that you discuss your personal financial circumstances with a financial adviser before undertaking any investments.

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