Bespoke Portfolio Service

Adding value to your client relationships

For professional advisers only

How much help a client needs from you will depend on their wealth, stage of life and investment goals - and sometimes the asks can mount up.

Our Bespoke Portfolio Services are here to help offload the pressure, so that you have more time to spend where it matters most.

BROOKS MACDONALD

A personal approach

By partnering closely with you, we'll gain an understanding of your client's individual investment goals and requirements. We'll use that knowledge to build and manage an optimum service for your client's precise and evolving needs. It's a winning combination of personal relationships and investment expertise.

BPS can help:

- Provide your client with an individually tailored investment approach that takes account of their full financial portfolio and personal circumstances.
- Reduce your administration workload by outsourcing portfolio management, freeing up time to focus on financial planning activities for your clients.
- Reduce the risk for your business by selecting an investment solution that has the ability to meet a range of suitability scenarios.

Financial options

For clients with more complex financial goals or circumstances, our Bespoke Portfolio Service (BPS) is a perfect, tailored, fit. It's a discretionary management service that's designed to go further than standardised investment solutions, with a bespoke portfolio created especially for your client.

BPS can help your clients with:

- Achieving their personal financial objectives.
- Complex tax circumstances.[1]
- Specific investment requirements, such as legacy assets and ethical and sustainable inclusions/exclusions.

Our Bespoke Portfolio Service goes further for your clients

	Asset allocation	Investment selection	Rebalancing	Personal investment objectives	Personal preferences and restrictions	Personal reporting	Phasing- in	Tax-wrapper management	Consolidation of assets	Capital gains tax allowance management[1]
Standardised investment management solution	✓	✓	✓							
Bespoke Portfolio Service	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Why Brooks Macdonald

- **Trusted partner** – we have over 30 years' experience in managing portfolios for clients and work to build long term relationships underpinned by professionalism and shared values.
- **Supporting clients** – we offer investment solutions that can support clients in achieving their financial goals throughout all stages of life.
- **Strength and depth of expertise** – our Bespoke Portfolio managers leverage the combined investment knowledge of Brooks Macdonald Group.
- **High quality service** – we are passionate about doing the right thing for our clients and aim to deliver the best outcomes for them.
- **Centralised Investment Process (CIP)** – developed over many years, our CIP brings rigour, consistency and discipline to our investment approach. Our investment managers leverage the broad and varied expertise of our asset allocation committee and specialist sector research teams when managing bespoke portfolios, and operate within a robust risk management framework.

1. Where applicable. Tax treatment depends on your individual circumstances and may be subject to change in the future. Brooks Macdonald does not provide tax advice and independent professional advice should be sought.

Find out more

Speak to your Brooks Macdonald contact for more information. Minimum investment: £250,000.

Important information

More information about the Brooks Macdonald Group can be found at brooksmacdonald.com

Contact us

For more information, please get in touch with us at

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