

Volatile Stockmarkets!

In for a shock!

60% of investors not reviewed for over 12 months

What should your financial adviser do for you?

How can Chartwell Wealth Management help?

The Portfolio Construction Service

How to contact us

Volatile Stockmarkets!

- ❖ When was the last time you heard from your investment adviser?
- ❖ Has your adviser gone quiet since the “credit crunch” in 2008? If so, it may be in your interest to take a closer look at where your money is invested
- ❖ What is your adviser's role and what is their responsibility when managing your portfolio?
- ❖ Has more than 12 months passed since your adviser last reviewed your investments?

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In for a Shock!

If you haven't reviewed your funds in recent years you might be in for a shock.

Out of over 2000 funds available in the UK alone, many that were on the "best buy list" 5 years ago, have been withdrawn or have been merged into a more successful fund from the same fund management group due to poor performance.

A fund that you invested in a few years ago may not be the same fund today. Different fund management styles suit different market conditions and so it is essential that a regular investment strategy review takes place.

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During the last 4 years we have seen unprecedented levels of stockmarket volatility following the banking crisis, but over 60% of investors have not had their portfolio reviewed for more than 12 months & 20% for more than 3 years. **Source: Research conducted by One Poll – 2010*

Not all Financial Advisers keep their clients informed and you should make sure that you have not missed out on strong investment returns before it's far too late. It's therefore important that you are kept up-to-date about how your fund is performing.

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What should your financial adviser do for you?

- ❖ Review your risk profile (on an annual basis)
- ❖ Diversify your investment strategy to reduce risk & volatility
- ❖ Agree whether you are investing for capital appreciation or capital preservation
- ❖ Help you to understand whether your tax position has changed since the last review
- ❖ Agree your investment timescale
- ❖ Regularly review your investment strategy; on an annual basis (at the least) & probably more often in this economic climate

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How can Chartwell Wealth Management help?

As part of a specialist Private Client business, Chartwell Wealth Management offers holistic financial planning on a fee charging basis.

We offer a series of pre-defined investment portfolios on our own Wrap (or platform) which also permits our clients to hold legacy investments and deposits under pension and personal portfolio strategies.

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- ❖ Scientific Risk Profiling methodology
- ❖ Design of a suitable “Risk Graded” investment strategy
- ❖ Portfolio Design and Construction
- ❖ Supported by regular reviews each step of the process
- ❖ Regular portfolio monitoring
- ❖ Re balancing of Investment Strategy to benchmark

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