

Investment partner

Company profile

Quilter Cheviot is one of the UK's largest investment management firms, offering unbiased investment services to clients. With a heritage that dates back to 1771, Quilter Cheviot takes a modern approach to investing, underpinned by traditional values which combine to provide an excellent, personal service to investors. The firm employs over 500 people, including 163 investment professionals and manages in excess of £ 17.8 billion (as at 31 December 2015).

Quilter Cheviot investment managers are based in 12 offices throughout the UK, Ireland and Jersey.

Why select Quilter Cheviot?

- Bespoke portfolios meet not only clients' investment objectives and personal risk requirements, but also cater for cherished holdings, capital gains tax management and income from capital as well as yield.
- Professional advisers have access to a dedicated intermediary support team
- Institutional buying power, reducing costs deducted from clients' portfolios.
- Strong emphasis on research and analysis, specialising in innovative and well researched investment ideas.
- Exposure to a broad range of asset classes and global investments, portfolios are well diversified.
- Performance reviewed against leading industry benchmarks and independent industry performance surveys, most notably Asset Risk Consultants, Defaqto, Enhance and the WM Charity Index.
- We do not divide the roles of relationship and investment manager; clients and their advisers will always speak directly to the person making the investment decisions.
- Clear, regular and comprehensive reporting, for clients and their advisers in the form of regular meetings, in print and online.

Pension Management

Pension fund management is a core part of our business. We manage investments on behalf of a wide range of pension schemes, not only Self Invested Personal Pensions (SIPPs), but also defined benefit, defined contribution, Small Self-Administered Schemes (SSASs), group SIPPs and offshore pension arrangements.

Our experience in the sector has allowed us to develop a clear understanding of the unique challenges and goals of each scheme type. The key to this success is our ability to combine a highly personal service with some of the best investment expertise within the sector.

No two pension schemes are the same, which is why we develop a bespoke investment approach for each fund.

Investment process

Quilter Cheviot has a rigorous approach to SIPP management. Our investment process combines our top down view, based largely on macro-economic inputs and market valuation, with bottom up recommendations from our team of analysts. Quilter Cheviot are firm believers in active investment management in terms of both the asset allocation and security selection, but with no particular bias towards a single investment style. The range of investments that can be used in SIPPs includes bonds, equities, collectives and alternative investments (including private equity, property, hedge and absolute return funds).

Once the strategic asset allocation and benchmark are decided, investment managers add value in two areas.

First, through tactical asset allocation which looks at relative weighting of different asset classes and sectors given the current circumstances, and secondly, through stock selection. The Quilter Cheviot Research Team focuses on around 360 major UK and overseas companies and a wide range of collective funds. The selection of stocks or funds for portfolios are based on the analysts' and the investment committee's recommendations, and the investment manager decides, based on the client's individual objectives which of these to select.

Charges

For further information regarding charges, please speak to your contact at Quilter Cheviot.

Adviser charges may be paid out of your SIPP cash account by AJ Bell Investcentre. In addition, your financial adviser may receive initial and ongoing payments from Quilter Cheviot.

AJ Bell Investcentre will not accept investment instructions - these must be arranged directly with Quilter Cheviot.

Your adviser is responsible for transferring cash between AJ Bell Investcentre and Quilter Cheviot. Your adviser must transfer cash using AJ Bell Investcentre's online cash movement facility.

Contact details

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