

Investment partner

Company profile

At Tilney, your client's personal wealth is our personal responsibility. We are a leading private client investment company that was founded more than 180 years ago and is trusted to look after more than £24 billion* of assets. All of our services are underpinned by a disciplined, rigorous investment process and delivered by some of the UK's most experienced and highly qualified investment professionals.

*Tilney Group 30 June 2018

Why select Tilney?

We have the capability to work with advisers in a flexible way that meets their business needs and offer a broad range of clearly defined investment solutions for clients whatever their stage of life or level of assets.

For those seeking absolute consistency and direct access to our very best thinking, we offer model solutions in either a unitised or managed portfolio service. Where a client's circumstances require elements of a portfolio to be tailored, our personalised investment management service can accommodate specific needs.

Our national reach means we can provide a truly personal service to financial advisers across the UK. We understand the challenges you face and by working in partnership, we can help you provide your clients with a truly enhanced investment management service.

Investment process

We aim to preserve and grow the real value of our clients' capital over time

In an investment world that is sometimes unpredictable, often irrational and all too often short-term in its outlook, we believe investment success can only be achieved by focusing on a small number of guiding principles. These principles inform all aspects of our investment thinking:

- that investors are particularly sensitive to losses rather than averse to taking risk
- that long-term success can only be judged relative to the returns from cash and inflation
- that equity will be the main driver of real returns, but that these returns require patience and discipline to achieve
- that short-term market movements are impossible to predict
- that portfolio diversification through the use of non-equity investments helps smooth the returns for investors

Implementing our core principles requires a structured and disciplined investment process. The 3 key stages to our process are.

Strategic Allocation: We are top down asset allocators. Our macro-economic analysis establishes the long-term framework in which we are investing

Tactical Positioning: We believe in the benefits of diversification. Our proprietary risk management tool optimizes portfolio diversification for market valuation and projected return

Fund Selection: We believe in the power of independent research. Our rigorous process identifies the best fund managers, with the highest long-term returns adjusted for risk

Central to our process is the Asset Allocation Committee, which is chaired by our Chief Investment Officer and attended by senior investment managers and research analysts. The committee meets on a quarterly basis and is responsible for setting the strategic framework, which guides both asset allocation and instrument selection

Fund charges and investment terms

Tilney offers a clean and simple fee structure that provides complete transparency for all parties involved. There are no transactional or dealing costs for our discretionary services. For more information, please visit www.professionals.tilney.co.uk

IFSL Tilney Bestinvest Advanced Passive Portfolio (APP)	IFSL Tilney Bestinvest Multi-asset Portfolio (MAP)	Managed Portfolio Service (MPS)	Personalised Investment Management Service (PIMS)
Minimum Investment £50,000	Minimum Investment £50,000	Minimum Investment £50,000	Minimum Investment £250,000
AMC 0.65%*	AMC 0.75%*	Service Fee 0.5%	Service Fee £0 - £1.25m = 0.75% £1.25m - £2m = 0.55% £2m + = 0.5%**

* Charged within the fund

** The rate at this tier is negotiable and will be agreed with the client prior to providing this service.

VAT is applicable on the Managed Portfolio Service and Personalised Investment Management Service. The Multi-asset Portfolio and Advanced Passive Portfolio is not subject to VAT.

Contact details

Tilney for Professionals has a dedicated and experienced Business Development Team that covers the UK.

Mark Coles – Director, East Anglia & London

mark.coles@tilney.co.uk

Mobile: 07870 851 180

Mike Hanlon – Director, London Central & South West

mike.hanlon@tilney.co.uk

Mobile: 07714 352 171

Andy Tompson – Manager, South East & South Coast

andy.tompson@tilney.co.uk

Tel: 0203 818 6685

Lucy Minton – Director, Midlands

lucy.minton@tilney.co.uk

Mobile: 07972 931 212

John Alexander – Director, North West of England

john.alexander@tilney.co.uk

Mobile: 07866 125 166

Jim Clay – Director, North East of England

jim.clay@tilney.co.uk

Tel: 0113 224 5560

Simon Brennan – Director, Scotland & Northern Ireland

simon.brennan@tilney.co.uk

Mobile: 07880 785 557