

Investment partner

Company profile

Brooks Macdonald is a specialist investment manager providing discretionary management services for private clients, trusts, charities, pension funds and institutions.

Their services combine a flexible, sophisticated investment management process with a high level of service that incorporates direct contact between clients and their investment manager.

From its outset, Brooks Macdonald has been a pioneer of fee-only fund management. The company prides itself on providing a wide range of products and services with competitive and transparent charging structures.

Understanding that investment management is only a part of the overall picture, Brooks Macdonald appreciates the importance of working closely with clients' professional advisers in order to ensure the best outcomes.

Since formation, Brooks Macdonald has grown steadily. The competitive nature of their offering has encouraged significant professional and personal referral, while their investment performance and service levels have led to a high level of client retention.

Why select Brooks Macdonald?

- Brooks Macdonald facilitates investment through a range of account types, such as SIPPs and ISAs, both onshore and offshore.
- Brooks Macdonald considers investment in all asset classes, via all investment media, rather than using a generic UK stockbroking model which only looks at cash, equities and fixed interest. This also allows them to achieve a higher level of diversification within investment portfolios, which can help to improve risk-adjusted returns.
- The company's asset allocation model affords individual investment managers the flexibility to use their own expertise to create truly bespoke portfolios, allowing them to reflect their clients' different objectives and risk profiles.
- Risk management is central to the company's investment philosophy, which focuses on 'risk-adjusted' investment returns; this means that they not only seek to generate profits, but simultaneously endeavour to limit the potential for losses. To accomplish this they have embedded qualitative and quantitative risk controls into their investment process.
- Brooks Macdonald's investment managers are responsible for carrying out both primary and secondary research for specific asset classes and investment vehicles. The result being that the managers of client portfolios are at the centre of the company's investment process, while every asset considered is continually reviewed to ensure its appropriateness for each portfolio.
- Brooks Macdonald can facilitate access to both absolute and relative return vehicles. They are also able to manage Alternative Investment Market portfolios that take advantage of business property relief for inheritance tax planning.
- The company provides a full administration and reporting service. This includes quarterly valuations, the availability of online access to valuations and the provision of consolidated capital gains tax reports at each tax year end.
- Brooks Macdonald is dedicated to providing consistently high levels of service and investment performance. This has been key in the growth of their funds under management to £8.3bn as at 30 June 2016.

Investment process

Brooks Macdonald's centralised investment process is designed to ensure that each client's investment portfolio leverages the broad and proven expertise of the company's asset allocation committee, investment committee and specialist sector research teams. It allows each investment manager to create diversified investment portfolios of varying risk profiles and ensures that the principles of the company's investment philosophy are reflected in client portfolios.

The process combines an asset allocation strategy (or a 'top-down' approach), with rigorous individual security selection (or a 'bottom-up' approach). It also incorporates a number of processes designed to ensure that investment portfolios are adequately diversified and that investment risk is appropriately managed. These are primarily implemented during the portfolio construction phase.

Fund charges and investment terms

For further information on charges please contact your local Brooks Macdonald New Business Development Manager listed below.

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 Brooks Macdonald. Your adviser can provide you with further details.

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

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

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