INVESTMENT PARTNER

Evelyn Partners

Company profile

Evelyn Partners is one of the UK's leading integrated wealth management and professional services groups, created by the merger of Tilney and Smith & Williamson. While our name has changed, our commitment to delivering a world-class experience to our clients remains as strong today as it always has been. Founded more than 180 years ago, the group is trusted to look after £55.8 billion* of assets for our global clients from offices across the UK, Republic of Ireland and Channel Islands.

*As at 31st March 2022

Why select Everlyn Partners?

We offer a broad range of clearly defined investment solutions such as bespoke mandates, model portfolios (including a sustainable range) and an AIM Portfolio Service. All of our services are underpinned by a disciplined investment process and delivered by highly qualified and experienced professionals.

Evelyn Partners' purpose is to '*place the power of good investment advice into more hands*', and we believe we are uniquely placed to support financial advisers and their clients navigate the ever-changing investment landscape to achieve their goals.

Investment process

At the heart of our investment approach is the belief that investors are particularly sensitive to losses, rather than being averse to taking investment risk. At Evelyn Partners, we aim to preserve and grow the real value of our client assets through time.

We believe asset allocation is the primary determinant of long-term investment performance. As a framework for constructing portfolios, we use a range of asset allocation strategies that have been determined by our Asset Allocation Committee. A dedicated investment manager will then fine-tune the allocation to meet your client's exact requirements, before selecting the investments held within each asset class. Evelyn Partners offers portfolios in both funds and direct stocks. Our managers are supported by our independent team of research analysts, who conduct formal monitoring and due diligence of assets, to ensure portfolios are invested across what we believe is the best range of investment options.

Investing means taking a degree of investment risk to generate a return, so the management and control of this risk is a key part of our investment service. In order to assist us, we have developed our own proprietary systems to monitor the risk we are taking when managing client portfolios. Our *Efficient frontier* helps us optimise the portfolio construction at the asset allocation level, ensuring we are not exposed to unnecessary or unreasonable risk for the returns we expect to make on your clients' behalf.

Our 10 principles for fund selection is a unique process built by us for the benefit of clients. This allows us to find and consider the very best external fund managers to include in client portfolios. By combining these tools when constructing portfolios, we are able to blend asset classes and investment vehicles to optimise returns in a risk-controlled manner.

Fund charges and investment terms

Please contact our team for details on our fees and investment terms.

Contact details

Please visit our website for details of your local Business Development representative.

Alternatively email IFAServices@evelyn.com

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! **The value of your investment and the income derived from it can go down as well as up and you can get back less than you originally invested. Past performance is not a guide to the future.**

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