

Focusing on:

Discretionary Investment Management

With a Discretionary Managed portfolio you entrust us to make investment decisions on your behalf; investing, monitoring and adjusting your portfolio within the agreed parameters, to make sure you don't miss out on appropriate opportunities or are exposed to unnecessary risks.

What is discretionary investment management?

With our Autonomous Discretionary Investment Management, you give us the discretion to manage your money and make decisions on your behalf in order to achieve your investment goals – whether you are seeking to grow your money, generate a regular income or a combination of both. Whatever your priorities, and whether you come to us as an individual, a family or a trustee, we're ready to focus on your interests and explore what we can do for you.

Is Charles Stanley discretionary investment management right for me?

Financial markets are extremely complex and ever changing. Our Discretionary Investment Management service allows us to make sense of those markets for you. We are equipped to move quickly in situations of sudden change or new opportunity, making critical investment decisions on your behalf.

Each portfolio is bespoke to you and you will have a dedicated investment manager to talk to – not a separate relationship management team.

Your dedicated investment manager will put together and continuously manage your portfolio in order to achieve your investment goals. This specialist has access to external research as well as support from our expert in-house research team. With Charles Stanley's breadth of experience and market insight, you can always be sure your assets are in safe hands.

We take the time to understand your needs, ambitions and attitude to risk, in order to custom-build a service that's right for you.

Our experience tells us that the people who benefit most from a Discretionary Managed service are those with insufficient time or inclination to manage their investments directly, and those who value:

- an investment specialist working continuously on their behalf, who can act quickly as markets change
- having one point of contact whilst maintaining a clear view of their investments through in-depth reporting
- having their assets held in tax-efficient 'wrappers'
- access to their portfolio at any time via our secure online portal; My Charles Stanley
- the ability to invest directly into the full range of retail asset classes.

Why choose Charles Stanley

Charles Stanley works for you. We take on your financial goals as our own, applying technology and deep market insight founded on genuine personal relationships.

Charles Stanley is here to help you achieve your financial objectives. While other firms have adopted a committee based approach, dictating to the relationship managers how a portfolio is invested, we at Charles Stanley continue to maintain an autonomous approach where the investment manager and their team manage client portfolios on a bespoke basis. This focus on you may seem out of step in a world of one-size-fits-all offerings, however, our success and reputation continues to prove the value of tailored investment advice, high-quality personal service for each client.

For information on these services, please speak to your Charles Stanley contact directly.

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Important information

Investors should note that the value of investments, and the income from them, can go down as well as up and that past performance is no guarantee of future returns. You may not recover what you invest.

The levels of taxation and their respective treatment depend on your individual circumstances and the applicable law, which may be subject to change in the future.

This document has been provided for information purposes only and does not constitute advice or a personal recommendation, nor does it constitute an invitation to purchase or sell units or shares. Investments or investment services referred to may not be suitable for all recipients. The suitability of a particular strategy will depend on an investor's individual circumstances and objectives.