



Bespoke Portfolio Management

Your goals, your needs –
our expertise.

For investors who are concerned that their portfolios have become too complex or are no longer appropriate for their needs – or simply that they are being over-charged – Buzzacott Financial Planning offers a reassuring alternative: a low-cost, risk-sensitive approach to wealth management based on experience, providing expert, independent advice that puts you, the client, first.

BESPOKE PORTFOLIO MANAGEMENT

The same approach holds true for those investors who come to us with cash to invest. A portfolio from Buzzacott Financial Planning is as individual as you are: tailored to your needs and circumstances, and most importantly, your attitude to risk. If the portfolios we create have attributes in common, they are those that investors are crying out for: a clear statement of charges, low costs and common-sense portfolio construction.

A portfolio that lets you sleep at night

Though we cater for all risk profiles, we find most investors put preservation of capital and long-term performance before short-term gains.

To build portfolios that – as one client put it – “let you sleep at night”, we draw heavily on academic research by Nobel laureates as well as our own. We begin by reviewing any existing investment that the client holds, to gain a comprehensive picture of the asset balance and exposure to risk. We reduce risk and cost by aiming for low investment turnover, using a combination of index-tracker and exchange traded funds, and some active funds.

In essence, the key to good returns is individually planned asset allocation across a range of asset classes. We monitor progress and report back regularly because success depends on being nimble and flexible. The separation of client assets and their placement with Pershing Securities Limited, a globally recognised custodian, provides further assurance.

Advisory service for a wide clientele

We look for – and generally have – long-term relationships with clients. Buzzacott Financial Planning cater for a wide clientele, with an investment threshold of £200,000 or more. As well as private clients, we look after charities, trusts and pension funds.

We launched our new, in-house Portfolio Management service in 2008 to complement existing provision. The service is advisory: you, not we, have the final say. Its popularity is highlighted in our in-house research which gave Buzzacott an 88% approval rating, with comments like:

“Buzzacott is a reliable, professional firm whose staff and service inspire confidence.”

Whatever your investment style, you should discover a strong chemistry with the Buzzacott Financial Planning team, which has huge experience across the spectrum of requirements and provides empathy, talent and continuity clients both deserve and need.