

Walker Crips' predecessors first bought and sold shares for clients on the London Stock Exchange in 1914. Through acquisitions, the company can now trace its roots as far back as the 18th century, making it one of the **City of London's oldest independent companies.**

Today Walker Crips Group plc is a fully listed UK public company.

We want you to feel confident that the financial decisions you take are **suitable and appropriate** for you and your future, by considering your own objectives and risk horizons when planning and implementing your investment strategy.

Where suitable we can select from our **complementary products** and services to build a customised financial programme around you and your requirements.

INVESTMENT MANAGEMENT

A wide range of services where you can choose your level of involvement in managing your investments. You can take all the investment decisions yourself and simply give us your instructions, you can access our advice or entrust your portfolio to our expert discretionary portfolio managers. As an independent investment manager, who is not tied to any existing funds or products, we can offer you transparency and flexibility to ensure that your objectives are met efficiently and successfully.

STOCKBROKERS

When buying and selling stocks and shares, you want to have assurance that your decisions are right to achieve your investment objectives. With a choice of services to suit how you want to manage your portfolio, you have the opportunity to make your own decisions and equally, if you would like the support of an independent professional you can seek the advice of your personal broker to make sure you are certain of your selections. Over time, as your portfolio and your confidence grows, or your circumstances change, you can move to another of our services either increasing or decreasing control over your portfolio.

STRUCTURED INVESTMENTS

Are you looking to invest in the future growth of an asset, but also require some level of protection to your capital? Structured Investments complement your existing investment portfolio and help you plan for the future, allowing you to invest without needing to keep a constant eye on the markets, make the most out of your personal allowances to keep your investments as efficient as possible and see the rewards you receive apply to every pound you invest without being subject to annual fees and charges.

WEALTH MANAGEMENT

A truly integrated wealth management service with life stage planning to suit your needs, our holistic financial planning process is complemented by our investment management solutions enabling you to plan for your children's education, increase your tax efficiency, ensure you achieve the retirement you want and even prepare for inheritance tax. We aim to help all our clients achieve financial security but understand that your own financial desires, investment tolerance and future aspirations will be unique.

PENSIONS

Enabling you to tailor your pension plan to make your retirement successful without taking up your valuable time, Walker Crips Pensions take on as much of the administrative work as possible for your SIPP or SSAS, keeping you up to date through all processes and leaving you with ultimate control. Through our SIPP and SSAS services you have access to one of the widest choices of investments and a say in how your retirement benefits are paid allowing a bespoke and comprehensive investment strategy.