

You are at the heart of our business and each service is tailored to fit around you and what you need to achieve to succeed in your investment objectives.

Your initial consultation will firstly examine your income and growth requirements moving on to define your goals, consider your approach to risk and establish how much involvement you would like in the day to day running of your portfolio.

DISCRETIONARY

Ideal for the investor who would prefer a 'hands off' approach. We will manage your portfolio on your behalf, controlling the day-to-day decisions for you with expertise and care to achieve the goals you set us. Our attention is focused on your objectives so we can respond to circumstances and market shifts quickly and smoothly, leaving you to concentrate on your other priorities.

ADVISORY MANAGED

For a more active role in the investment process. Your portfolio manager follows an agreed brief and you are consulted for any changes that our advisers consider and your approval is final. You retain ultimate control, but know that your investments are being expertly watched.

ADVISORY

For when you are confident in controlling your own investment initiatives and would also like to request isolated advice on a wide range of potential investments. You are involved in every portfolio development. Final decisions are yours, but we will be on hand for advice and counsel.

EXECUTION ONLY

From investors wishing to buy or sell small numbers of shares to active and daily traders, our telephone and internet services provide quick and easy dealing for those comfortable making their own investment decisions.

If you are an active trader and looking for leveraged opportunities within your portfolio, you can also take advantage of our Contracts for Difference and Traded Options services.

To discuss a service that interests you or schedule your initial consultation please contact your Walker Crips account executive or call the private client team on 020 3100 8100