



Discretionary Investment Management

WALKERCRIPS
Investment Management



**Growing with our
clients to make
investment
rewarding**



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Discretionary portfolios for you

At Walker Crips we have been providing individuals, their families, trusts and charities with successful wealth and investment strategies for over a century. Our actively managed discretionary service allows you to concentrate on other priorities, by entrusting us with the management of your investment portfolio.

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 with expertise and care to achieve the financial goals you set us.

The hallmarks of our actively managed discretionary service:

Your own personal investment manager, available to answer your questions and provide guidance.

A portfolio developed and personalised to accommodate your specific requirements.

A portfolio closely monitored on an ongoing basis, adjusted in accordance to your objectives and tolerance of risk.

Access to your dedicated investment manager, regular portfolio reviews, and daily updated online portfolio information.



How we construct portfolios

When we say actively managed, we mean it. Rather than follow a prescribed investment style or trend, we concentrate on how to blend your investments to maximise performance in line with your attitude to risk and objectives. To create the best potential for strong performance we identify areas of the market with the greatest opportunity that, relative to their risk, can provide you with healthy returns.

Our investment managers have access to external market research and analysis, as well as guidance from the Walker Crips Investment Oversight Committee. The Investment Oversight Committee addresses and assesses the forces, pressures and opportunities afforded by the financial markets, with a focus on diversification and risk mitigation.



Targeting performance

The day-to-day management of your portfolio is the responsibility of your personal investment manager, who will focus on mitigating risk and seeking return opportunities. Your investment manager will respond rapidly and appropriately to fresh data, research, analysis and other external influences in order to ensure your portfolio remains within your agreed return objectives, your requirements and your risk profile.

Getting to know you

Your goals and life journey are unique to you. That's why we will never take a one-size-fits-all approach to managing your investments, instead focusing on providing a service that aligns with your goals.

When we first meet, we'll ask questions to get to know you and to build a thorough understanding of your objectives, attitude to risk, and investment preferences. Your answers will help us form an investment proposition right for you.

What are your financial objectives?

- Are you looking to generate an income, achieve growth, or a balance of the two? Your investment manager will discuss your investment objectives with you.

What is your attitude to risk?

- All our portfolios are constructed based on your attitude to risk, your account background, your financial objectives, and your asset preferences.

How would you like to invest?

- Your investment manager will be able to advise on investments held within a variety of investment vehicles including ISAs, SIPPs, SSASs, offshore bonds and trusts.
- In consultation with you we will discuss which underlying assets would be most appropriate, and consider any restrictions or criteria you may have for investments.

• Flexibility

Well organised and nimble, we respond rapidly to changes in market sentiment and wider global development.

• Transparency

Our service is completely transparent, and we will always act in your best interests. Regular meetings with your investment manager will allow you to discuss your portfolio performance, ask questions and update us with any changes to your objectives and circumstances.

• Independence

We are independent from other financial institutions, so we can choose the best investments at the right time for your benefit. This approach means there are no conflicts of interest when we are managing your money.



Next steps for you

To invest in our discretionary investment management service you will need to complete an application form and a risk profile questionnaire to return to us, along with documents to verify your identity and address.

If you would like any assistance with the completion of our application forms and risk questionnaire, one of our investment managers will be pleased to go through the paperwork with you to discuss the suitability of this service and your objectives and financial circumstances.

If you have any queries about investment, please consult your adviser or nearest office.

London – 020 3100 8000

Old Change House
128 Queen Victoria Street
London EC4V 4BJ

Newbury – 020 3100 8802

5 Lower Woodspeen Court
Woodspeen
Newbury RG20 8BL

Birmingham – 020 3100 8120

126 Colmore Row
Birmingham B3 3AP

Truro – 01872 248688

5 Walsingham Place
Truro
Cornwall TR1 2RP

Bristol – 020 3100 8294

Broad Quay House
Prince Street
Bristol BS1 4DJ

Wymondham – 020 3100 8113

3 Church Street
Wymondham
Norfolk NR18 0PH

Epping – 01992 563626

Brickfield House
High Road, Thornwood
Epping CM16 6TH

York – 01904 544 300

Apollo House
Eboracum Way
York YO31 7RE

Inverness – 020 3100 8109

2 Ardross Street
Inverness IV3 5NN



Where you can find us

We create and establish long term, local relationships with our clients, delivering an efficient and professional service.

A proud history of looking after our clients

Walker Crips' predecessors first bought and sold shares for clients on the London Stock Exchange in 1914, making it one of the City of London's oldest independent companies.

Today, Walker Crips Group PLC is a public limited company, listed on the London Stock Exchange.

Founded on traditional values of integrity, courtesy, fairness and loyalty, we have maintained these ideals and remain committed to serve our clients and to deliver good customer outcomes.





Risk warning The value of any investment and the income from it is not guaranteed and can fall as well as rise, so that you may not realise the amount originally invested. This document has been prepared by Walker Crips Investment Management for clients and/or potential clients who may have an interest in their services.

Walker Crips Investment Management (WCIM) is authorised and regulated by the Financial Conduct Authority (FCA) in the conduct of investment business and is a member of the London Stock Exchange. WCIM provides services that are defined by the FCA as “restricted advice” because we do not consider the full range of investment products that are available to Retail clients but focus on stock market and stock market based investments and other similar products. When selecting stock market based investments and other products on behalf of clients however, we are independent from other financial institutions. Information contained within this brochure is correct as of April 2023.

Walker Crips Investment Management Ltd registered office: Old Change House, 128 Queen Victoria Street, London, EC4V 4BJ. Registered in England and Wales number 4774117.

020 3100 8000
private.client@wcgplc.co.uk
walkercrips.co.uk

