



Tatton
Investment Management

Tatton Bespoke Portfolio Service



Investment Evolved

Tatton was founded with the single goal of bringing expert investment management services to a wider range of investors, at the same time reducing the cost of investing.

Part of Tatton Asset Management plc, we are established as one of the fastest-growing investment fund managers of our kind.

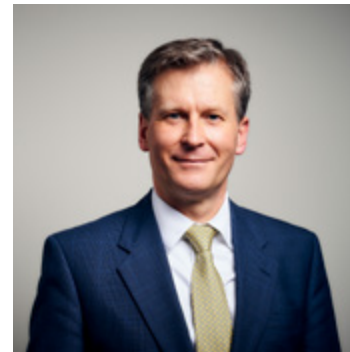
The Tatton Bespoke Portfolio Service is an extension of our Managed Portfolio Service and is designed to benefit investors that need a more tailored service.

As CEO of Tatton, I am committed to providing the highest quality portfolio management services at the most competitive price to our clients, whatever their investment objectives.



LOTHAR MENTEL

Founder, Chief Executive,
and Chief Investment Officer



Bespoke Portfolio Service

Our Bespoke Portfolio Service is a discretionary investment portfolio service tailored around clients' specific investment requirements. We only work with Financial Advisers.

Our team of experienced investment professionals takes the time to build a bespoke portfolio that is aligned to a clients' aims, attitude to risk and preferred investment style.

Available exclusively on platform and applying Tatton robust investment process the Bespoke Portfolio Service is customisable, flexible, highly diversified, and cost-effective.

Benefits at a glance

- A portfolio built around specific objectives
- High-quality investment expertise at a competitive cost
- Online access through an investment platform

The value of investments can go down as well as up and you may get back less than the amount invested.



Built around your objectives

The Bespoke Portfolio Service from Tatton is fully customisable while also being straightforward and transparent.

Available in a range of strategies and risk profiles, it allows you to delegate the day-to-day investment decisions and ongoing management of investments to an experienced team that always has your objectives in mind.

The individual portfolio will be invested in a diversified blend of assets. Our investment team follows a core and satellite approach to building portfolios that offers you simplicity and flexibility.

CORE

The core element of the portfolio consists of one of our six risk-profiled portfolios, which hold a blend of actively managed and passive funds. We will adjust the amount we invest in the core to reflect existing holdings or objectives, always staying within the parameters of the investment mandate agreed with you.

SATELLITE

The satellite component is the truly tailored part of your portfolio and reflects your specific investment wishes, for example retirement saving or ethical investing. These are called strategies.

OUR STRATEGIES



LIFE STAGE INVESTING

This strategy is designed to meet income or saving requirements, while accounting for estimated inflation over a rolling six-year period. The aim is to provide comfort that your income or saving requirements are invested ahead of their need. This reduces the risk of not meeting that objective without considerable capital erosion when markets are volatile.



THEMATIC INVESTING

Certain investment themes, such as infrastructure and healthcare, offer the potential for steady long-term structural returns. This strategy offers diversification across global markets and themes by investing in sectors that can also perform well in an environment of rising inflation.



ETHICAL INVESTING

This strategy provides a portfolio that is managed under Tatton's Ethical considerations for investors where Environmental, Social and Governance (ESG) considerations matter. We combine negative and positive screening to give you peace of mind that your portfolio not only align with your principals, but can also generate returns in line with your risk profiles.



CHARITIES AND FOUNDATIONS

Trustees who look after investments for charities and foundations have a big responsibility. At Tatton, we offer a bespoke investment management strategy designed to generate the best possible investment return for charities and foundations with their chosen level of risk and fully aligned to their investment policy statement.

The value of investments can go down as well as up and you may get back less than the amount invested.

Why invest with Tatton?

At Tatton, our ambition is to place active portfolio management within the reach of most retail investors. With our Bespoke Portfolio Service, we extend our current service to include sophisticated investment management tailored to your specific needs – in a cost-effective and transparent package.

Whether you are seeking growth, income, or a combination of the two, your portfolio will be constructed with the aim to continually meet the investment objectives and provide value for money. Our Bespoke team will also keep you informed about your portfolio every step of the way. You will receive quarterly and annual performance updates and benefit from personal access to your dedicated investment manager responsible for managing their portfolio.

THREE REASONS TO CHOOSE TATTON

Proven capabilities and process

Our investment team follows a clearly defined and robust investment process that draws on its experience and expertise. Each investment decision is well-considered, leading to portfolios that contain the most suitable blend of global assets, regions and strategies to help meet your investment objectives.

Low in cost, high on sophistication

Our dedication to working only with Financial Advisers means we understand the importance of choice, flexibility and affordability. We provide a fully bespoke portfolio that addresses your complex financial needs while ensuring that it is competitive on price while offering the highest levels of support and service.

Focusing solely on investment management

We believe in the importance of high-quality financial advice. Our sole purpose is to partner with Financial Advisers who are seeking an outsourced investment manager who can provide them with the investment management services they need to meet your investment objectives.

The value of your investment can go down as well as up and you may get back less than the amount invested.



The Bespoke Investment Process

Our Bespoke Portfolio Service (BPS) builds on the existing robust Tatton investment process whilst using the specific expertise of our bespoke investment managers to construct a portfolio that aims to meet your objectives.

Tatton BPS will only manage investments via a Financial Adviser. The Financial Adviser is critical to the process as they know you and will provide Tatton with the right mandate so our investment managers can construct the bespoke portfolio accordingly.

When we build investment portfolios, we look at various factors starting with your long term objectives. We analyse how best to meet these by taking account of the global economic, monetary, fiscal, financial, and corporate environment. We then select investments for your portfolio that can best meet these objectives, in the most cost effective way. Working with your Financial Adviser we will manage your portfolio in the most tax efficient manner. All of this is described and managed through your investment mandate. Tatton does not provide tax advice.

Please note: Our regulator, the Financial Conduct Authority, does not regulate tax advice.

WE LOOK AT THE BIG PICTURE

No one person has all the answers. Our investment professionals work in a tight-knit, collegiate environment that encourages the sharing of ideas. The team meets on a regular basis to review developments in financial markets and the global economy.

SIX STEPS

We follow a six-step investment process that aims to deliver repeatable results over the long term regardless of market and economic conditions. Our investment process embraces forward-looking scenarios; this approach allows us to react dynamically to changing conditions and implement investment ideas that consistently align with each portfolio's risk parameters whilst keeping costs low.

A TEAM-BASED APPROACH

We perform extensive research. When we identify an opportunity, we deploy a rigorous approach examining all aspects of the opportunity and the best way to implement it in your portfolio.



Our charges

At Tatton, we are committed to generating sustainable returns and keeping costs low.

Our team believes discretionary investment management should be accessible for all, not just the very rich, and that difference is at the heart of our investment philosophy and how we manage money.

With no branch network, managing your investments only on a Platform and a dedication to working only with Financial Advisers, we are able to offer fully bespoke portfolios at a competitive price.

Annual management charge 0.375% + VAT

The annual management charge is only one aspect of the total costs you will incur from your investment portfolio. For a full breakdown of all the costs please contact the dedicated Bespoke Investment Managers who can provide a breakdown based on your objectives.

Bespoke Portfolio Service team

Our Bespoke Portfolio Service team constructs your individual investment portfolio and manages the day-to-day operations, trading and investment monitoring of your investments.

They ensure each portfolio continues to be managed in line with your investment objectives while reflecting the geographical and tactical asset allocation decisions made by our Investment Committee. With a dedicated team focused on the Tatton Bespoke Portfolio Service you have one point of contact to get regular updates and information.

A COMMITMENT TO INVESTMENT EXCELLENCE

Our aim is to produce outcomes that align with your objectives by delivering Investment Excellence.

To us, this has three key elements:

- Generating returns
- Risk management
- Competitive fees

The combination of all three of these elements is what generates truly sustainable returns. Portfolio returns are the most visible performance indicator but can only be achieved within your risk tolerance – we will not compromise risk to chase returns.

Similarly, we will not compromise returns through unnecessary costs, so we try to lower the cost of investment wherever possible. Our approach allows us to identify opportunities and use them in appropriate portfolios. We stay within the agreed risk parameters whilst managing costs and tax efficiencies creating a compelling combination value proposition for you.

Our regulator, the Financial Conduct Authority, does not regulate tax advice.



LOTHAR MENTEL

Founder, Chief Executive, and Chief Investment Officer



CLAIRE BENNISON

Director of Investment Solutions



JOHN MESSER

Investment Manager

Providing value



YOUR BENEFITS

- A portfolio constructed according to your specific requirements and risk appetite
- Active management of your portfolio to help ensure it is meeting its objectives
- Available only on platform to ensure flexibility and simplicity
- Regular communication, including quarterly performance portfolio activity updates

Our focus is on ensuring clients' receive exceptional investment management as well as value for money.

This means that when you invest with us, you receive the same standard of service that is generally associated with more expensive investment managers. Key to this is providing direct access to the investment professionals who manage client portfolios.

When we build portfolios, we constantly assess all the available opportunities for both their investment potential as well as their costs

Awards and Access

We are proud to have won awards for our products and service.



All our portfolios have been Five Star rated by Defaqto since 2013

2022		Best Outsourced Investment Firm		Best Investment Service
2021		Best Outsourced Investment Manager		Best Investment Service
2020		Best Discretionary Fund Manager		Best Discretionary Fund Managers
2019		Best Discretionary Fund Manager		Best Boutique Wealth Manager
2018		Best Discretionary Fund Manager		Best Boutique Wealth Manager
2017		Best Discretionary Fund Manager		Best Boutique Wealth Manager
				Best Investment Product Provider - AIM IHT Service

WE ARE AVAILABLE ACROSS THE FOLLOWING INVESTMENT PLATFORMS

Please talk to us about the potential to use other investment platforms.





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All calls to and from our landlines and mobiles are recorded to meet regulatory requirements

Tatton is a trading style of Tatton Investment Management Limited, which is authorised and regulated by the Financial Conduct Authority.

Financial Services Register number 733471.

Tatton Investment Management Limited is registered in England and Wales No. 08219008.

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