



**Tatton**  
Investment Management

# Media Kit

## ABOUT TATTON

Tatton Investment Management Limited was launched in 2013 and is the market leading Managed Portfolio Service DFM in the UK, managing over £16.55 billion of assets (as at March 2024).

Our sole focus is investment management and we believe in the importance of high-quality financial advice. Therefore, we partner with Financial Advisers who are seeking an investment manager that can provide them with the investment services they need to meet their clients' needs.

Tatton is not a traditional wealth management firm that has adapted its business to work with Financial Advisers – we are a business designed to benefit the advice sector and place it at the heart of its product and service development.

Since our formation 11 years ago, we have helped drive down the cost of discretionary investment management in the UK, in particular through the fees charged by MPS providers. We take great pride that the average cost of MPS is now only around 50% more than our 0.15% fee, when 11 years ago it was more than double, and in many cases three times as much.

The team at Tatton are immensely proud to have won numerous awards such as Best Discretionary Fund Manager, the Best Investment Service Provider and the Best Outsourced Investment Management through the votes of Financial Advisers and Paraplanners not judging panels – the strongest endorsement of our found principles on sustainable repeatable investment performance, lowering costs and increasing service standards.

2017	2018	2019	2020	2021	2022	2023



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



## Areas of Comment

### **MACROPOSITION: ECONOMIC**

Global economy, UK economy, sector specific themes e.g. autos, geopolitics, macro-trends, central banks, market technical, big corporate stories.

#### **SPOKESPEOPLE**



**LOTHAR MENTEL**  
*CEO & Chief  
Investment Officer*



Lothar co-founded Tatton in 2012, and has overseen its growth to becoming a leading discretionary fund manager in the UK. His passion is to make the highest quality investment management available to most investors and is driven to ensure Tatton provides investors consistent repeatable investment performance coupled with the highest possible service standards.

In an investment management career spanning three decades, was previously Chief Investment Officer at Octopus Investments and designed and launched the Barclays Multi-Manager fund range. He has also held senior roles at NM Rothschild, Threadneedle and Commerzbank Asset Management.



**ASTRID SCHILO**  
*Chief Investment Strategist*



Astrid researches and builds the tactical investment proposals for the full range of Tatton portfolios. Astrid was previously at Mediolanum Asset Management as Senior Macro Strategist, Senior Research Principal at Accenture, the Chief European Economist at Exane BNP Paribas.



**JIM KEAN**  
*Chief Economist*



Jim brings more than 30 years' investment experience to Tatton, directing our strategic and global market research. He is responsible for the macro allocation and heads the investment analyst function.

### **MACROPOSITION: TECHNICAL MARKET ANALYSIS**

#### **SPOKESPEOPLE**



**CLAIRE BENNISON**  
*Director of Investment Solutions*



Drawing on 30 years of Financial services experience, Claire extends our portfolio service for more complex and high net worth clients. Claire joined us from Brooks Macdonald, where she was Director of Services and Products having previously been Head of Currencies and Technical Analysis at Barclays.

#### **BACKGROUND BRIEFINGS**

For further information or briefings:

**Roddi Vaughan-Thomas**  
Head of Communications and Marketing  
**E:** Roddi.vaughan-thomas@tattonim.com  
**T:** 020 7139 1452 **M:** 07469 854 011

Available for:  Broadcast  In-person interviews  Written articles





## Areas of Comment

### **MACROPOSITION: INVESTING**

Current portfolio positioning and tactical allocations, general portfolio construction, asset allocation strategy, active/passive, ESG investing, fund selection, high net worth investing.

### **SPOKESPEOPLE**



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**JAMES SAUNDERS**  
*Head of Portfolio Management*



James's analysis focuses on fund selection, performance attribution and building asset

allocation processes. James previously acted as Portfolio Manager at Sandaire, Investment Analyst at Lord North Street Limited and Trader at Tibra Capital. CFA charterholder.



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*Director of Investment Solutions*



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Claire extends our portfolio service for more complex and high net worth clients. Claire joined us from Brooks Macdonald, where she was Director of Services and Products having previously been Head of Currencies and Technical Analysis at Barclays.



**CHRISTOPHER ROBINSON**  
*Head of Investment Specialist Team*



Chris provides analysis of Tatton's investment strategy,

portfolio construction and performance to advisers using Tatton. He draws from his experience as a former direct equity and multi-asset analyst and plays an active role in Tatton's investment process, strategy and sits on its Ethical Investment Committee. Chris is a CFA Charterholder, holds the CFA UK Certificate in ESG investing and a BSc (Hons) Economics degree.

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## Areas of Comment

### THE BUSINESS OF INVESTMENT

Investment platforms, investment charges, role of financial advisers, investment reporting, discretionary investment management. We will not comment on individual stocks, tips or competitors.

### SPOKESPEOPLE



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**JUSTINE RANDALL**  
*Chief Commercial Officer*



With 25 years' financial services experience, Justine is our Chief Commercial Officer and leads

our distribution, marketing and proposition teams. A part of the Tatton family for over 6 years, she is a regular industry speaker, raising awareness of MPS overall and championing our goal to bring down the cost of investing. Justine is a passionate leader and thrives working at the forefront of our distribution teams engaging with our strategic partners and IFA advocates.



**RODDI VAUGHAN-THOMAS**  
*Head of Communications and Marketing*



Roddi directs and manages the marketing and communications

output of Tatton, overseeing the brand and its footprint, ensuring the provision of clear accessible communications and content for IFAs and their clients. Roddi has over 25 years' experience directing and managing communications for financial services firms, having previously qualified as a Financial Adviser. With extensive agency experience, Roddi has helped develop numerous market-leading investment and wealth management brands and products to the IFA sector.

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