



Model Portfolio Service

WALKERCRIPS
Investment Management

What is the Model Portfolio Service?

For over a century Walker Crips has provided private clients with investment strategies, preparing and compiling portfolios from our eclectic collection of investment managers; all with the aim of presenting the appropriate investment solution to you, our client.

Walker Crips' Model Portfolio Service consists of considered investments at reasonable price points, offering clients ready-to-invest portfolios combined with a personal service. With our **Model Portfolio Service**, we take care of the day to day management of your portfolio; allowing you to focus on life's other priorities.

Benefits of the service



Professional management

- Our rigorous investment process is focused on positive performance.
- Ongoing professional management ensures our investments remain suitable for your attitude to risk.



Cost effective and transparent

- Our fees are transparent, we provide full details of all costs related to your portfolio before you invest.
- If underlying charges apply to specific funds, we'll always keep you informed of the cost.



Broad asset diversification

- Our portfolios cater diversely to a range of investment objectives.
- We match your risk preference to our ready-to-invest offerings.



Responsive investments, communicated clearly

- Our Model Portfolio Service portfolios can respond to fluctuations in market conditions quickly and efficiently.
- Our ready-to-invest portfolios remain in line with your objectives, requirements, and preference for risk, thanks to regular monitoring and re-balancing.
- We update our investment commentary regularly, keeping you in touch with market news and our adjustments to your portfolio.

Why use Walker Crips' Model Portfolio Service?

Our model portfolio service is designed to provide you with a simplified and streamlined investment experience. You benefit from a professionally managed investment strategy without the need to continually monitor and rebalance the portfolio yourself.

Why compromise on quality of service?

By investing in one of our Model Portfolio Service portfolios, you can take advantage of personalised strategy where it counts. Once paired with the portfolio most appropriate for your financial goals, your investment manager will be available to answer any and all questions; keeping you connected to your investments. As part of our service to you, we will provide you with a quarterly client pack, quarterly report, and an annual client review; all personalised with information regarding your portfolio.

Why not gain from a second opinion?

Our Central Investment Team leverages its knowledge and expertise to develop the criteria for each portfolio; employing a rigorous approach when selecting the underlying benchmarks and parameters for ready-to-invest Model Portfolio Service portfolios.

The Central Investment Team is charged with overseeing the investment process of Walker Crips, in order to provide common investment foundations and articulate company wide investment philosophy and strategy. The committee reviews risk ratings according to prevailing market conditions and economic environments, ensuring the appropriate asset allocations for the Model Portfolio Service.



Next steps


To invest in Walker Crips' Model Portfolio Service or to find out more information please contact us

020 3100 8100 private.client@wcgplc.co.uk

Who is this service suitable for?

This service is suitable for:

- Investors with limited to extensive investment experience;
- Investors who do not wish to have any input into the investment content of their portfolio;
- Investors who are comfortable with exposure to investment risk;
- Investors wishing to invest for the medium to long term (a minimum of 3-5 years).



This service is not suitable for:

- Investors who are not willing to accept any capital loss;
- Investors seeking to make their own investment decisions;
- Investors wishing to invest for a period shorter than three years;
- Investors requiring an Environmental, Social and Governance (ESG) compliant portfolio.



To access the full Target Market Information for this service, please visit walkercrips.co.uk/consumerduty or scan the QR code.



Important information

The value of any investment and the income arising from it is not guaranteed and can fall as well as rise, so that you may not get back the amount you originally invested.

The performance of individual portfolios may differ from the model portfolio due to timing differences in implementing investment decisions, the impact of annual management charges, trading taxes, individual restrictions and taxation constraints. Movements in exchange rates can have an adverse effect on the value. The asset allocations indicated may vary marginally depending on prevailing market conditions. Information contained within this brochure is correct as of March 2024.

Walker Crips Investment Management Limited is authorised and regulated by the Financial Conduct Authority and is a member of the London Stock Exchange. Registered Office: Old Change House, 128 Queen Victoria Street, London, EC4V 4BJ. Registered in England and Wales number 4774117.



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