

PK WEALTH Direct Bond & Equity Portfolio Service

investments@pkgroup.com

pkgroup.co.uk/pk-specialist-service/pk-wealth/

+44 (0)20 8334 9953



Actively managed portfolios of either direct UK-listed equities or GBP-denominated corporate bonds. Both portfolios are appropriate for individuals applying for the Tier 1 VISA immigration programme.

Direct Bond & Equity Portfolio Service Summary

- ❖ Truly bespoke: individual portfolios are constructed for each client's requirements
- ❖ Active investment management process incorporates portfolio construction and risk management strategies
- ❖ Asset selection process combines in-house research with external investment consultants
- ❖ Competitive cost structure
- ❖ Minimum investment: £1,000,000 for bond portfolios, £250,000 for equity portfolios
- ❖ Annual management fee of 0.5% + VAT, plus custody and underlying charges

Direct Bond & Equity Portfolio Service Benefits

- ❖ Portfolios generally consist of 10-20 holdings ensuring appropriate diversification
- ❖ Versatile portfolios are appropriate for a variety of different purposes.
For example the corporate bond portfolio is suitable for a low risk total return approach combining income and capital growth, or as an income strategy generating a competitive long-term income stream
- ❖ Each portfolio can be adapted for Tier 1 VISA purposes
- ❖ Quarterly performance reporting and online access to portfolios available 24/7

Meet the managers

Graham Frost
Chief Investment Officer



Graham heads up the asset allocation and investment research process. He is an industry commentator and has over 30 years of experience.

Michael Usher
Investment Director



Michael has extensive investment experience and is involved in the asset allocation and portfolio construction process.

Professional Adviser

AWARDS
2021

FINALIST

Best Discretionary Fund Manager

Background to PK Wealth

- ❖ PK Wealth is part of PK Group, a financial and professional services firm founded in 2003
- ❖ Headquartered in Richmond, PK Group provides wealth management, accountancy, tax planning, financial planning & employee benefits services

IMPORTANT INFORMATION

Past performance is not a reliable indicator of future returns. The value of investments and the income derived from them can go down as well as up and you may not get back the amount invested. The information in this document does not constitute advice or a recommendation and is for the information of the recipient only. Investment management and portfolio services are provided by PK Wealth Limited which is authorised and regulated by the Financial Conduct Authority. PK Wealth Limited is registered in England (number 08991126).