

## IHT Portfolio Service

1 Parkshot Richmond Surrey TW9 2RD

investments@pkgroup.com pkgroup.co.uk/pk-specialist-service/pk-wealth/

+44 (0) 20 8334 9953



Innovative, active discretionary portfolio management service providing diversified, risk-rated exposure to AIM and Asset-Backed investments.

#### **IHT Portfolio Service Summary**

- ❖ Innovative portfolio of AIM and Asset-Backed (AB) investments that qualify for Business Relief
- ❖ Five risk profiles with different allocations to AIM & AB investments
- ❖ Active discretionary management approach seeking to adjust exposure as appropriate
- Minimum investment: £200,000
- ❖ Annual management fee of up to 0.5% + VAT, plus custody and underlying charges

#### **IHT Portfolio Service Benefits**

- Robust due diligence process comparing strategy, cost and performance across a large number of portfolio managers
- Introduction of volatility analysis supporting construction of risk-rated portfolios
- ❖ Access via GrowthInvest, an adviser-focused technology platform, specifically designed to simplify the consolidation of tax efficient investments in one workspace.
- ❖ We work with you to deliver an IHT strategy aligned with your clients' requirements. Bespoke strategies can be designed around specific circumstances
- Competitive fee structure incorporating discounted rates from underlying managers

#### 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).