For Professional Intermediaries Only

PK WEALTH

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IHT Portfolio Service

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.

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