For Professional Intermediaries Only

PK WEALTH

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

1 Parkshot
Richmond
Surrey
TW9 2RD

+44 (0)20 8334 9953

Managed Portfolio Service

Globally diversified, multi-asset risk-rated discretionary portfolio management service. Both active and passive solutions are available.

Managed Portfolio Service Summary

- Active discretionary management approach seeking to adjust exposure to each asset class over time and as appropriate
- Five risk profiles with diversified allocations across equities, fixed income, alternatives and cash
- Model portfolios available across a range of intermediary adviser platforms
- Minimum investment: £50,000
- Annual management fee of up to 0.50% + VAT, plus custody and underlying charges

Managed Portfolio Service Benefits

- Access to global, diversified, liquid assets
- Strategic asset allocation sets the framework for efficient long-term portfolio management
- Portfolios generally consist of 20-25 holdings to ensure global multi-asset diversification
- Best of breed investment universe includes OEICs, Unit Trusts, Investment Trusts and ETFs/ETCs
- 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. He joined PK Group in 2016.

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 investment management, accountancy, tax planning, financial planning & employee benefits services