

Direct Equity & Corporate Bond Portfolio Services

Actively managed portfolios comprising a combination of direct UK-listed equities and GBP-denominated corporate bonds.

Direct Equity & Corporate Bond Portfolio Services Summary

- ❖ Bespoke portfolios individually created for each client's requirements
- ❖ Active investment management incorporating portfolio construction process and risk management strategies
- ❖ Asset selection combining in-house research with external investment consultants
- ❖ Competitive cost structure
- ❖ Minimum investment: £250,000 for equity portfolios, £1,000,000 for bond portfolios
- ❖ Annual management fees of up to 0.5% pa + VAT, plus custody and underlying investment charges

Direct Equity & Corporate Bond Portfolio Services Benefits

- ❖ Portfolio diversification ensured through 10-20 individual holdings
- ❖ Versatile portfolio strategies including income and/or capital growth
- ❖ Fully adaptable for Tier 1 VISA purposes
- ❖ Quarterly performance reporting and online portfolio availability 24/7. Access to investment managers

Meet the Managers



Michael Usher
Head of PK Wealth

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



James Regan
Senior Investment Manager

James specialises in client portfolio management with specific responsibilities for asset allocation and fund research.



Helene Jelman
Senior Investment Manager

Helene provides advice on asset allocation strategy to the PK Wealth Investment Committee as well as contributing to investment research.

Professional Adviser

**AWARDS
2021**

FINALIST

Best Discretionary Fund Manager

Background to PK Wealth

- ❖ PK Wealth is an independent subsidiary within PK Group and provides investment management services to a range of clients in conjunction with their professional advisers.
- ❖ PK Group is a financial and professional services firm founded in 2003 and headquartered in Richmond. PK Group provides wealth management, accountancy, tax and financial planning 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).