

# Doherty

Pension & Investment Consultancy Ltd



ESTABLISHED IN 1985, DOHERTY PIC LTD, IS A LARGE, LOCALLY-OWNED FINANCIAL PLANNING FIRM IN NORTHERN IRELAND

114 – 116 Royal Avenue, Belfast, BT1 1DL

*Doherty Pension & Investment Consultancy Limited is authorised and regulated by the Financial Conduct Authority.  
The Financial Conduct Authority does not regulate Tax Advice or Estate Planning.*

*“We put the needs of our clients first, and strive to help them meet their goals, avoid pitfalls and feel secure in their financial lives.”*



## OUR TEAM

**Our team is our difference** – we have a diverse range of specialist staff offering a breadth of unique skillsets and qualifications. We can offer unrivalled expert advice in a wide range of areas to benefit our clients at any stage in their lives.

Our expert team of professionals include tax specialists, pension

experts including a dedicated SSAS department, employee benefits speciality, investment management team, dedicated service delivery area and highly skilled compliance and administrative professionals in various areas across the business to ensure we deliver the highest standard of service. Our team have

well over 200 years of combined experience, and we collaborate extensively to leverage this knowledge and bring about the best possible outcomes for our clients.

We put the needs of our clients first, and strive to help them meet their goals, avoid pitfalls and feel secure in their financial lives.



*“Our clients, like us are here for the long term, our focus is on getting the fundamentals right and following time-tested investment principles.”*

## OUR INVESTMENT ADVICE

Our long-term view and focus on fundamentals have delivered excellent results across our range of portfolios - including coming through the COVID-19 pandemic ahead of benchmarks in all of our offerings.

One of the key reasons for this, we believe, is our strict no-nonsense approach. We build and review portfolios with the aim of them withstanding political and economic swings and doing their jobs consistently for the long term.

The result is a robust investment process that really adds up in our clients' favour.

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*“With our investment management, being a responsible investor doesn’t mean sacrificing returns – in fact it could mean boosting them.”*

## ACTIVE AND PASSIVE

Our investment offerings are researched, designed and reviewed regularly by our specialist investment department with the aim of optimising returns while managing volatility and risk.

### **Active and Passive**

Our investment team can choose from the whole of the market to find the best fund offerings available. We make use of the reliability and low cost of passive investing where appropriate, and offer a suite of fully passive investments, which track market indices such as the FTSE All-Share at an extremely low

cost for clients wishing to reduce costs to a minimum.

In other ranges we either blend this with, or exclusively use actively managed funds – designed to invest in only the best businesses and outperform the market average. Where we do so we review our selections regularly and seek funds with consistent outperformance and solid fundamentals, avoiding speculative or needlessly high-risk investments.

### **Responsible Portfolios**

Responsible Investing is a philosophy we strongly believe in. This

**RISK WARNINGS**  
Your investment may fall as well as rise and you may not get back what you put in

emboldens clients to invest their assets with the aim of supporting strong businesses which make positive changes in the world via environmental, social or governance policies. Many of the resulting portfolio companies are market leaders in their own right – therein lies their ability to lead the way toward better business practices – and we have seen these companies outperform substantially since we launched this strategy in 2017.

With our investment management, being a responsible investor doesn’t mean sacrificing returns – in fact it could mean boosting them.

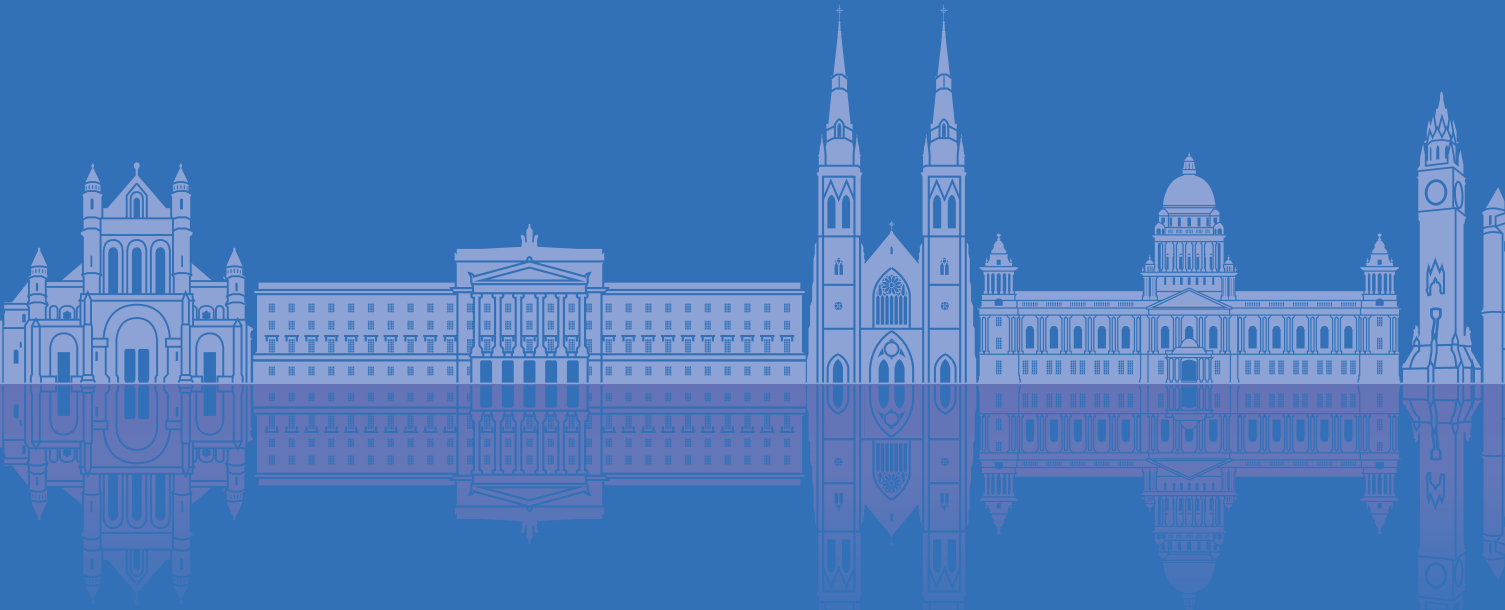


# CONTACT US

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