Doherty

Pension & Investment Consultancy Ltd

Discretionary Fund Management Service

www.dohertypic.com

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PEACE OF MIND

Our Discretionary Fund Management Service

The financial world moves at an extremely fast pace and Investment Managers must be ready to react quickly and effectively to volatile markets.

At Doherty Pension & Investment Consultancy Ltd (Doherty PIC Ltd) we recognise the need to monitor investments on a regular basis and our Discretionary Fund Management Service offers an active and timely portfolio management service, allowing our Investment Team to take the responsibility for making all investment decisions within your portfolio, in line with your objectives and attitude to risk.

Choosing our Discretionary Fund Management Service allows your Investment Manager to take responsibility for the day-to-day decision-making on your portfolio, deciding where to invest and when to buy or sell.

This service is designed for clients who wish their Financial Planning Consultant to take responsibility for all their investment decisions from the construction of their portfolio and on a daily basis from then on. This gives you peace of mind knowing your portfolio is being looked after in line with your future plans and attitude towards risk so that you can focus on other aspects of your life.

Active and timely portfolio management service.

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THE BENEFITS

Benefits of choosing our Discretionary Fund Management Service

The benefits of our Discretionary Fund Management Service include:

- More sophisticated portfolios with enhanced diversification
- Improved ability to manage risk and volatility
- Immediate portfolio updates with our latest research and market observations
- Timely rebalancing to perpetuate a cycle of buy low, sell high across different assets
- Controlled exposure to areas such as infrastructure, renewables, emerging markets
- Regular updates on portfolio performance and activity
- Access to our dedicated team of experienced investment specialists
- A comprehensive range of managed investment solutions in line with the investment objectives agreed by you, including model portfolio solutions
- Constant oversight and decision-making with the aim of ensuring your portfolio remains on track to achieve your financial aims
- Better execution of our time-tested long-term investment approach

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HIGHLY EXPERIENCED

Our Team

Investment Management is a key area of expertise for us and our Discretionary Fund Management Service is run by our highly experienced Investment Team who actively manage our portfolios and will aim to achieve the best return for each level of risk.

We have an Investment Committee that review changes and make decisions on funds monthly. We believe that long-term performance is best derived through actively managed, multi-asset portfolios diversified across asset classes, geographies, and sectors with a consistent focus on preserving your wealth.

At Doherty PIC Ltd, we pride ourselves in providing tailored financial solutions for both private and business clients. This is achieved with both integrity and professionalism, using expertise which has developed over the last 35 years. By combining our advisory service together with our Discretionary Fund Management proposition, our clients will benefit from a more cohesive strategy that is tailored to their financial needs.

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RESEARCH AND SELECTION

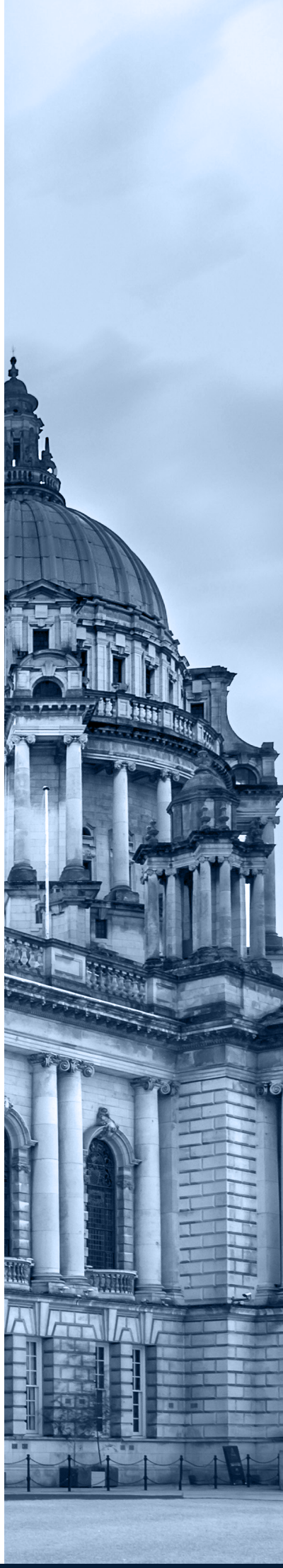
Our Investment Philosophy and Process

Our Discretionary Fund Management Service is driven by a detailed fund research and selection process.

We research a range of global asset classes to find the best opportunities for our portfolios. Focus is placed on achieving reliable, long-term success via disciplined approach and a keen awareness of investment psychology. We follow time-proven principles such as diversification, rebalancing and avoiding over-activity. This approach has enabled us to deliver excellent results across our range of portfolios.

We design and adapt 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, which aims to deliver a tailored service for you, our client.

Focus is placed on achieving reliable, long-term success.



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BUILDING YOUR PORTFOLIO

Our Portfolio Ranges

Our investment offerings enable clients to select a portfolio that meets their objectives.

With guidance from their financial planning consultant, they can discuss options and preferences such as taking an income or compounding capital growth, minimising costs or seeking outperformance, optimising long term returns or managing volatility and short-term risk.

BUILDING YOUR PORTFOLIO

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 and S&P 500 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.

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BETTER BUSINESS

Responsible Portfolios

Responsible Investing is a philosophy we strongly believe in. This 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 practice.

OPEN AND TRANSPARENT

How we keep you informed

Every quarter, you will receive up to date Fund Factsheets that show the performance of your portfolio. You will also receive a report containing a market update, portfolio activity and discusses our expectations for the future.

Depending on your agreed level of service, you will have telephone access to your Financial Planning Consultant and can have regular meetings with them to ensure your needs are met and reflected in your portfolio.

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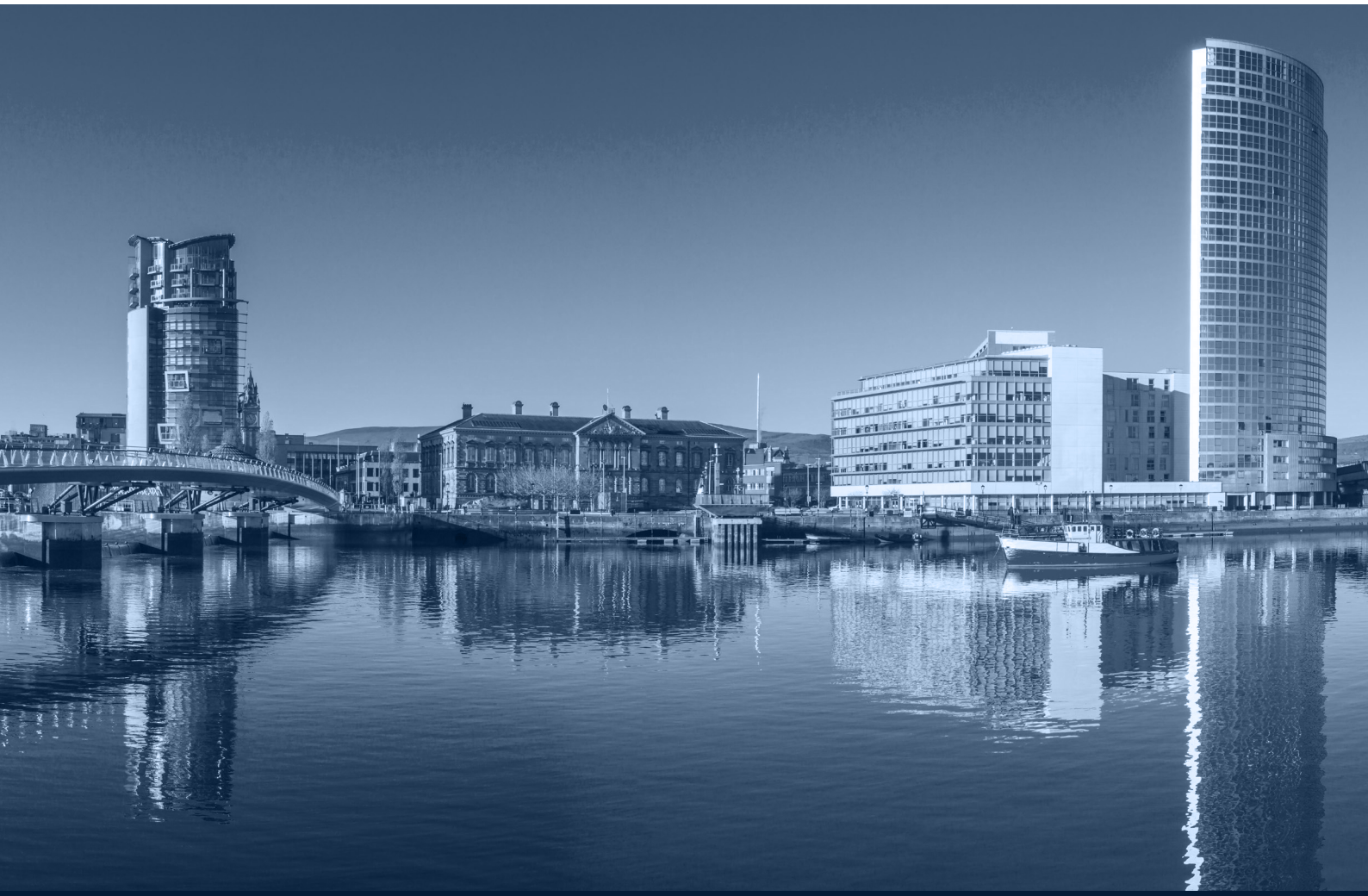
READY TO MAKE A MOVE?

Contact us

For more information on our Discretionary Fund Management Service or to arrange a meeting with a Financial Planning Consultant, please:

call 02890 533350 or
email dfmservices@dohertypic.com



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