ARTORIUS WEALTH

Services available to clients

Wealth Planning

Portfolio & Investment Solutions

Core Philosophy Service

Specialist Mandates & Non-Advisory Services

Directed Mandates

Unconstrained Mandates

Self-Directed Investments

Private Office Services

Consolidated Reporting & Analysis

Credit Structuring

Real Estate Advisory

Banking & Custody Advisory

Lifestyle

Wealth Planning

Everything we do for clients starts with a detailed Wealth Management Plan

Plan

We start by listening, enabling us to understand you and your family's living, lifestyle and legacy objectives.

Once we understand where you are and where you want to be we will construct a detailed plan for you and your family.

Your plan will include near-term cash and capital planning and longer term generational planning.

Recommend

Our recommendations will be focused on delivering your family objectives, factoring in our expertise on investment returns and including tax structuring implications.

Implement

The recommendations to which you agree will then be implemented, working in conjunction with trusted professional partners where required.

Monitor

We will, on an ongoing basis, monitor your plan and support you through any future changes that need to be reflected in it.

Portfolio & Investment Solutions

Core Philosophy Portfolios

This then leads to portfolio solutions tailored to your needs and objectives

Portfolios are designed to be fully integrated with the objectives defined in the Wealth Management Plan.

Our Investment Team will start with the asset allocation, as this determines the vast majority of a portfolio's return profile.

Portfolios are optimised using our internal views and research on Global Sustainable Returns and are built to reap the benefits of geographic and asset class diversification.

Portfolio design starts with our hypothesised optimal solutions, based on cost, risk and return. These are then flexed to consider a client's legacy holdings and other assets.

We select assets to populate the portfolio drawing on our investment research database. We ensure each choice is suitable for the client, taking into account tax and liquidity constraints.

Client portfolios are managed proactively across the economic cycle to take advantage of opportunities and risk mitigation where possible.

Specialist Mandates & Non-Advisory Services

For clients wanting a different portfolio management approach or advice specific to one area, or who are simply keen to receive a flow of niche investment ideas on a non-advised basis, we can be directed by you

Directed Mandates

For clients who wish to determine their own mandate, based on client-specified asset allocation parameters.

We will identify potential risks and compromises in this approach by reference to our core philosophy.

We will populate the directed asset allocation with assets based on our asset research and intelligence.

We will thereafter provide ongoing oversight and monitoring of the portfolio.

Directed Mandates may only be applied to High Net Worth clients.

Discretionary or Advisory

Unconstrained Mandates

For clients who want to direct us to construct a portfolio with them based on ideas and themes, rather than an asset allocation methodology.

We can provide advice and ideas to clients with unconstrained advisory portfolios, overseeing and monitoring these portfolios on the client's behalf.

Fees may comprise an annual advisory fee or may be based on individual transactions, depending on the service agreed.

Unconstrained portfolios will typically be suitable for Sophisticated / Professional Clients only

Advisory

Self-Directed Investing

For clients who want access to investments and deals, and/or engage in placing trades, all on a self-directed basis but require our support with execution.

We can provide exposure to deal flow from Investment Banks, Fund Managers, Corporate Financiers, Client Networks etc.

Clients undertake their own due diligence to be responsible for investment decisions (Artorius not required to give advice, nor ongoing oversight).

Optional ongoing consolidated reporting and analysis service.

Non-Advisory

Private Office Services

Through both in-house expertise and our professional network, we can provide unconflicted advice and assistance across a full suite of services. This may range from simply consolidating all of your assets into a digestible report to give you a clear picture of your wealth, to finding you the perfect new home. Our Private Office services are available to all clients.

Reporting & Analysis

This service is for clients who want a consolidated view of their assets, liabilities and investments.

This service can be provided whether the assets are actively managed or advised upon by Artorius Wealth or not.

We will provide quarterly reports as standard; you can request ad hoc reports as and when you require.

This service provides a consolidated view of the investments and reports on performance but importantly does not give advice.

Credit Structuring

Whatever your needs, we can help facilitate the right loan for your situation.

Our team are experienced in Lombard loans, residential mortgages, and specialised asset-backed finance.

As we are not lenders ourselves, we undertake pricing and structuring analysis with a wide range of third party providers

We can manage the process of raising credit with third parties for you through introductions, negotiations with credit teams, assisting the application process and with general administration, and ongoing monitoring.

Real Estate Advisory

We can source Real Estate (both residential and commercial) specific to your requirements.

We conduct detailed pre-purchase market analysis to establish fair values.

Our specialists will assist with active price negotiation, and use a success based fee structure.

We can advise on the structuring of your properties – for example, analysing the most appropriate holding vehicle.

Banking & Custody Advisory

This service helps to provide your family with efficient banking solutions.

Through our relationships with a range of the leading global banks, we can arrange cost-effective custody (Global Custodian or Multi-Bank Custody)

We can manage all third parties on agreed custody platforms.

The service draws together your wealth to provide Consolidated Reporting, Tax Reporting and Liquidity Management.

Lifestyle

We have identified specialists in various fields who can help you enjoy you wealth.

Some offer our clients preferential terms, but all are trustworthy experts, selected as they share our values of independence and integrity.

Our partners offer:

- Concierge Service
- Classic Car consultancy
- Yacht consultancy (hire or purchase)
- Aircraft consultancy (hire or purchase)
- Art consultancy