



ARTORIUS WEALTH

S E R V I N G   G E N E R A T I O N   A F T E R   G E N E R A T I O N

---

## OUR PROPOSITION

---

Proprietary & Confidential

## *Services available to clients*



## Portfolio & Investment Solutions

### Wealth Planning

### Core Philosophy Portfolios

### Specialist Mandates & Non-Advisory Services

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

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

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

#### 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

Working with trusted professional partners and counterparties we will implement your agreed solutions.

#### Monitor

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

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.

### 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.

### 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.

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

### 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 and are responsible for their own investment decisions

Optional ongoing consolidated reporting and analysis service.

Discretionary or Advisory

Advisory

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 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 your 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



## Important information

This presentation is for information only and is intended to highlight one or more of the service propositions of Artorius Wealth. The presentation is not intended as an offer or solicitation for the purchase or sale of any financial instrument. Nothing in this presentation is intended to be, or should be construed as, regulated advice. Reliance should not be placed on the information contained within this brochure when taking individual investment or strategic decisions.

Any advisory services we provide will be subject to a formal Engagement Letter signed by both parties. Any Investment Management services we provide will be subject to a formal Investment Management Agreement, which will include an agreed mandate.

Past performance is not a guarantee of future performance and investors may not get back the amount originally invested. Investing involves risk, including possible loss of principal.

Artorius Wealth is a trading name of Alfred Simmons Investment Management Ltd. Artorius Wealth London and Artorius Wealth Manchester are appointed representatives of Alfred Simmons Investment Management Ltd which is authorised and regulated by the Financial Conduct Authority.

\*These services are not regulated by the FCA

Artorius Wealth Switzerland AG is a provider of wealth management services to the benefit of private individuals. We are an active member of the Swiss Association of Asset Managers ("SAAM") – a Swiss self-regulating organization in matters of anti-money laundering and asset management recognized by the Swiss Financial Market Supervisory Authority ("FINMA"). For clients of Artorius Wealth Switzerland this document is intended for 'Qualified Investors' only and is not intended as an offer or solicitation for the purchase or sale of any financial instrument.

### Our Contact Details

#### LONDON

Gridiron, 6th Floor  
One Pancras Square  
London, N1C 4AG  
+44 (0)20 3039 3040

#### MANCHESTER

2nd Floor, The Boardwalk,  
21 Little Peter Street  
Manchester M15 4PS  
+44 (0) 161 711 0730

#### ZURICH

Schlüsselgasse 3,  
8001 Zurich,  
Switzerland  
+41 (0) 44 542 8338