

WEALTH CONSULTANCY SERVICES



"STRATEGY IDENTIFICATION, INVESTMENT MANAGER SELECTION AND ONGOING ASSESSMENT OF SUITABILITY"

To achieve investment success it is essential to get it right from the start and follow a disciplined ongoing review process.

- Understand the objectives and crucial information that will impact the choice of strategy.
- Write an Investment Policy Statement (IPS) to clearly articulate the requirements.
- Select investment managers with a proven pedigree for the chosen strategy.
- Monitor the portfolio against the objectives in the IPS.
- Review the investment manager to ensure they remain fit for purpose.
- Regularly reappraise objectives.

1 RESEARCH *'INVESTMENT OBJECTIVE EVALUATION'*

- Enhance conducts a comprehensive 'fact find' to ascertain relevant information about client circumstances.
- We evaluate client return objectives and risk tolerance.
- Then research additional criteria that is fundamental to the management of the portfolio.

3 IMPLEMENT *'IDENTIFYING PROVEN MANAGERS'*

- Enhance offer impartiality and objectivity in the identification and assessment of some of the world's leading investment managers.
- We have proven and demonstrable expertise in the research, selection and monitoring of portfolio managers.
- It is through comprehensive operational due diligence together with in-depth proprietary client performance and volatility data that leads to the appointment of a strong investment manager.

2 STRATEGISE *'INVESTMENT POLICY STATEMENT'*

- The choice of strategy will have as great an impact on future returns as the choice of investment manager.
- It is crucial to get the investment strategy right from the start.
- We aim to ensure that all parties agree on the objectives, how it will be achieved and monitored.

4 MONITOR *'PORTFOLIO AND INVESTMENT MANAGER'*

- Corporate restructuring, organisational change, staff mobility and volatile markets make the on-going monitoring of an investment manager as important as the initial selection.
- We produce a quarterly assessment, which reviews performance and risk together with strategy adherence.
- Our clients will also have the comfort of knowing that Enhance are conducting rigorous due diligence on the selected investment manager on a quarterly basis and continuously assessing their appropriateness in relation to the mandate.

ENHANCE WEALTH CONSULTANCY LIMITED

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Enhance Wealth Consultancy Limited is regulated by the Jersey Financial Services Commission to conduct investment business under the Financial Services (Jersey) Law 1998.

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