

## Cantab Private Office

Cantab Asset Management's Private Office looks after a select group of wealthy individuals and families in the UK and overseas. Absolute discretion and trust are the watchwords for our team. We work closely with you and your advisers to provide the advice and expertise required for your individual needs.

We assist in the structuring of your investments, the cashflow planning to address your particular circumstances and the professional skills to tackle the wide diversity of business interests, family trusts and charitable activities with which you may be involved.

### Investment Management

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We provide both advisory and discretionary investment management services. We will work with you to establish the levels of risk and return which you consider appropriate and develop a financial plan with you to facilitate the achievement of your objectives. We will discuss any particular investment preferences which you may have and incorporate these into the planning process.

Our discretionary investment service will then work to implement the plan, report back regularly to you on the performance and provide guidance on the achievement of your desired objectives. The investment manager will create and maintain portfolios that are specifically designed for you and customised towards helping you achieve your objectives on a pre-agreed risk profile.

We are able to manage investments in different jurisdictions and currencies. We work with other professionals such as lawyers and tax advisers to achieve the most appropriate structures and investments.

### Succession

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Preparation of the next generation for wise stewardship of inherited resources is a key component to effective succession planning. Assets passed on without appropriate education, clear thought or tax planning can represent a huge burden which can be overwhelming for the recipients. In addition, some recipients may lose motivation and cease to pursue their life's interests and aspirations.

We will endeavour to assist you and your other professional advisers to ensure that your wills are up to date, that any succession planning is robust and that the next generation is helped to take on the responsibilities envisaged.

### Alternative Approaches

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We are creative and flexible and can provide you with innovative solutions to challenges that you face as you consider your interests now and in the future.

As you would expect from Cantab Asset Management, we will provide the professional skills and the business analysis and research that will assist you achieve your objectives.

Please call our Team on 020 3651 0570 (London) or 01223 52 2000 (Cambridge) to discuss in more detail.



## Cantab offers clients a holistic service

Cantab Asset Management provides comprehensive financial planning and wealth management services to a range of clients. We provide clients with a fully integrated approach seeking to cover all areas of their financial situation.

For Institutional Clients, this will typically include a mixture of asset allocation, performance analysis and investment management advice, but may include individual stock selection and discretionary portfolio management. Areas of specialisation include:

- Investment advice and wealth management
- Asset allocation
- Income projections
- ESG investments
- Liability driven investments
- Consolidated reporting and benchmarking
- Portfolios to meet different objectives

For Private Clients, this will typically include a mixture of pensions, tax and investment management advice, but may include estate planning, trusts and charitable giving. Areas of specialisation include:

- Comprehensive Financial Planning
- Investment advice and wealth management
- Retirement planning and pensions
- Estate and trust planning
- Taking benefits
- Cash flow planning
- Offshore investments

Cantab's portfolios are available as segregated portfolios or within the VT Cantab Open Ended Investment Company (OEIC). Cantab has over £1 billion in assets under management.

**Risk Warnings** This document has been prepared based on our understanding of current UK law and HM Revenue and Customs practice as at 26 July 2021, both of which may be the subject of change in the future. The opinions expressed herein are those of Cantab Asset Management Ltd and should not be construed as investment advice. Cantab Asset Management Ltd is authorised and regulated by the Financial Conduct Authority. As with all equity-based and bond-based investments, the value and the income therefrom can fall as well as rise and you may not get back all the money that you invested. The value of overseas securities will be influenced by the exchange rate used to convert these to sterling. Investments in stocks and shares should therefore be viewed as a medium to long-term investment. Past performance is not a guide to the future.

[cantabam.com](https://www.cantabam.com)

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