

Cantab Service for City Partners

Cantab Asset Management has experience of working with Partners in the leading legal and accountancy firms in London. Partners are busy and their time is precious. Cantab understands how to work with Partners in an efficient and compliant manner. Cantab seeks to be a 'trusted adviser', helping clients optimise their existing portfolios whilst assisting with the planning for future requirements.

Service

Cantab aims to serve Partners holistically taking into account individual needs and objectives. Cantab's services include:

- Astute financial planning and thorough investment research;
- Portfolio management keeping Partner administration time to a minimum;
- Regular reporting on portfolio performance;
- The latest technology and platforms for investments;
- Portfolio performance which would place Cantab in the top quartile of the FT Wealth Managers Report;
- Meetings in clients' offices;
- Competitive fees.

Independence

As from 1 January 2013, investment advisers have to state whether they provide 'independent' or 'restricted' advice. Cantab is 'independent' providing advice on all areas of private client investment and providing access to products from across the whole market. Independent advisers are the only category of adviser providing unbiased and unrestricted advice for a client based upon a comprehensive and fair analysis of the whole of the marketplace and all of the relevant tax wrappers.

Cantab's view is that it is in every Partner's best interest to appoint an independent adviser in order that finances may be managed in a comprehensive and holistic manner with all options available and considered.

Cantab has developed an Open-Ended Investment Company ('OEIC') to benefit clients with additional structural options for holding investments. Cantab does receive an investment management fee from the OEIC and so has a 'conflict of interest' which is declared and transparently addressed in the Client Agreement.

Compliance

Cantab creates portfolios for Partners that meet with firms' compliance requirements. Where required, investments are first screened with the Partner Independence team. Only approved investments are made available for Partner investment.

Please contact our Team on 020 3651 0570 (London) or 01223 52 2000 (Cambridge) to discuss in more detail or email advice@cantabam.com.



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

Cantab's portfolios are available as segregated portfolios or within the VT Cantab Open Ended Investment Company (OEIC). Cantab has c. £1bn 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 1 January 2023, 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.

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