



Making the most of **Your financial journey**

Church House Investment Management is a private wealth management business that delivers *peace of mind investing* through a range of solutions for individuals, families, trusts and institutions.

A unique understanding of the best way forward

In an increasingly complicated world, private and professional investors are faced with a number of choices from many different service providers. Products and services can be shrouded in complexity making it difficult for investors to reach informed decisions.

Our focus is to ensure our processes, products and services are tailored to our clients' needs.

In acting as an independent investment manager, we recognise the private nature of wealth and the responsibility felt by those entrusted with investing on behalf of others. Whatever its origins, we understand that wealth not only provides a foundation for financial security but, if carefully managed, it can help investors achieve their personal aspirations together with those of their families and future beneficiaries.

We believe financial peace of mind is an essential part of personal well-being and that we can help investors achieve that through a considered and supportive process.

Navigating the Pathways to prosperity



No two people, families or institutions are the same.

Choice and flexibility are critical to ensuring that clients receive the most suitable investment solution for their personal circumstances and needs, as well as those of their families.

As a trusted guide, we take time to understand what matters most to our clients and use our expertise to shape a skilful investment strategy that can deliver the outcomes they seek.

Our propositions are designed to appeal to a wide range of investors, such as individuals looking to optimise their wealth so they may achieve personal and family aspirations or entrepreneurs looking to safeguard the proceeds of a business sale.

Furthermore, we are perfectly positioned to support those who are responsible for investing on behalf of others. Trustees, attorneys and charities are attracted to our ability to blend efficient portfolio solutions together with premier service, ensuring a quality experience at all times.



The benefits of **Smart Investing**

Our fund and portfolio solutions are all managed to a consistent and proven investment process, which has been refined over nearly twenty years. The central tenet of our approach is the avoidance of a permanent loss of capital and, from that foundation, we aim to produce returns which reflect an investor's appetite for risk. This is matched with a commitment to manage clients' money with the same care and attention as if it were our own.

Portfolios are based on a proven framework that optimises the characteristics of different assets in order that we can offer solutions which appeal to a range of investor expectations and objectives.

We use six in-house funds, within which our experienced and expert managers have full control over each and every investment decision, as core portfolio building blocks. This helps us to control investment risk and cost whilst ensuring our clients receive a high-level of clarity regarding where their money is invested.

A bespoke style. **Tailored Portfolios**

Using our in-house funds as the foundation, these customised portfolios include complementary third-party investments so we can fine-tune the balance of risk and reward to meet an investor's specific requirements.

Ideally suited to those with more complex needs, this service is all about providing a truly personal strategy for managing wealth.

A clear direction. **Managed Portfolios**

A series of portfolios has been constructed by blending solely Church House funds to meet a variety of investor objectives and risk preferences.

Competitive pricing and award-winning technology make these an ideal option for those with straightforward needs, while low initial investment levels make the solution accessible to a wide audience.





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