CHARLES STANLEY

Focusing on you

FOCUSING ON

Private Client Services

Focusing on you

Charles Stanley works for you. We take on your financial goals as our own, applying technology and deep market insight founded on genuine personal relationships. We can provide advice on investments – either managing them on your behalf or supporting you in managing them yourself – and can help you with retirement and inheritance tax planning.

Our focus on clients has lasted since our founding in 1792 and has helped make us one of the UK's leading wealth management firms. In a world where investors are overwhelmed by complexity and are looking for trust, we believe our constant focus on you will become recognised as a model for the future.

1792

We have been providing our clients with the highest standard of service for over two centuries.

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Our business is built on quality service, growing our network to more than twenty offices across the UK.

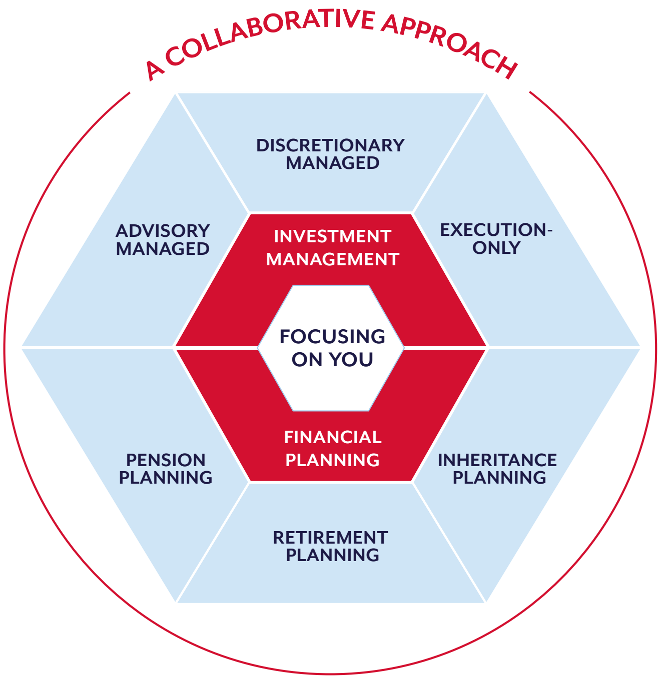
£25.1BN

We have created financial security for many tens of thousands of people, and our funds under management and administration were £25.1 billion as at 31 March 2023.

Focusing on what matters to you

For more than 200 years we've been helping people like you achieve their financial goals. We explore every aspect of your financial world – your ambitions, your concerns, your attitude towards risk and your preferred way of working.

So what matters most to you? Is it making the most of your retirement? Being able to fund your children's education? Having a robust plan for inheritance tax, or selling a business? Helping those close to you with the cost of a wedding or a first home? Is it more important to grow your money or be able to draw a comfortable income from your investments? Perhaps a balance of these. Whatever your priorities, and whether you come to us as an individual, a family or a trustee, we're ready to focus on your interests and explore what we can do for you.



DISCRETIONARY MANAGED
With a Discretionary Managed portfolio, you trust us to make investment decisions for you. We have the resources to move quickly when situations change suddenly or when new opportunities appear.

ADVISORY MANAGED
Would you like us to advise you on your investments and manage your portfolio day-to-day to agreed guidelines? We can tailor an Advisory Managed service for you, allowing you to step in and make the final decisions about buying and selling assets.

EXECUTION-ONLY
If you want to manage your investments personally but need first class delivery to act on your decisions, you may be interested in our execution-only services.

Wealth needs managing – now more than ever

With the world continually changing, it can be hard to gain a clear view of seemingly distant financial goals, let alone work out how to achieve them. Innovation is everywhere, creating new possibilities. People are living longer, staying in better health and expecting more from life. Meanwhile, tax and pension laws mean we all face far more complex choices about our financial futures.

We look objectively at your plans and apply a long-term view, making sure your investments continue to work for you as your priorities change over the years. When planning your retirement, for example, we'll help make sure your pension can provide a lifestyle you can look forward to, with tax-efficient inheritance plans in place for the people and organisations you care about.

Preserving and protecting your wealth and generating income demand professional expertise. But the benefits of high-quality, focused investment management go far beyond the financial returns. Having the right relationship in place frees you up to get on with the rest of your life, and face the future with clarity, confidence and peace of mind.

A service that's right for you

Charles Stanley is here to help you achieve your financial objectives. We begin with a question: what do you want your money to do for you?

We take the time to understand your needs, ambitions and attitude to risk, to custom-build a service that is right for you.

Our success and reputation continues to prove the value of tailored investment advice, high-quality personal service, and a close working relationship with each client.

While our investment focus is precise, you have a broad choice in how you benefit from our skills. Whichever service you choose, we can help you to wrap your investments tax-efficiently in SIPPs and ISAs.

Investing for you

When deciding the best investment solution for you, we believe your portfolio should be as individual as you. We consider a whole range of factors, including your financial situation, your objectives, your appetite for risk, your relationships and commitments, timescales and how much control you want to maintain.

Only then do we apply deep market insight, state-of-the-art technology and the strictest investment criteria to identify the asset classes, sectors, equities and funds best placed to achieve your goals.

If you choose a fully bespoke portfolio we will select each investment for you. Alternatively, one of our model portfolios might fit your needs.

Both our bespoke and model portfolio services combine rigorous processes with a human touch, regularly reviewing your investments and remaining ready to adapt as your needs and goals change.

Managing your discretionary portfolio

MANAGE RISK
Using our expertise assisted by technical software.

THOROUGH RESEARCH
From internal and external specialists, macroeconomic input, fund manager meetings, industry reviews.

DEVELOP LONG-TERM ASSET ALLOCATION
Efficiently targeting sectors, markets and types of securities to suit your risk profile and objectives.

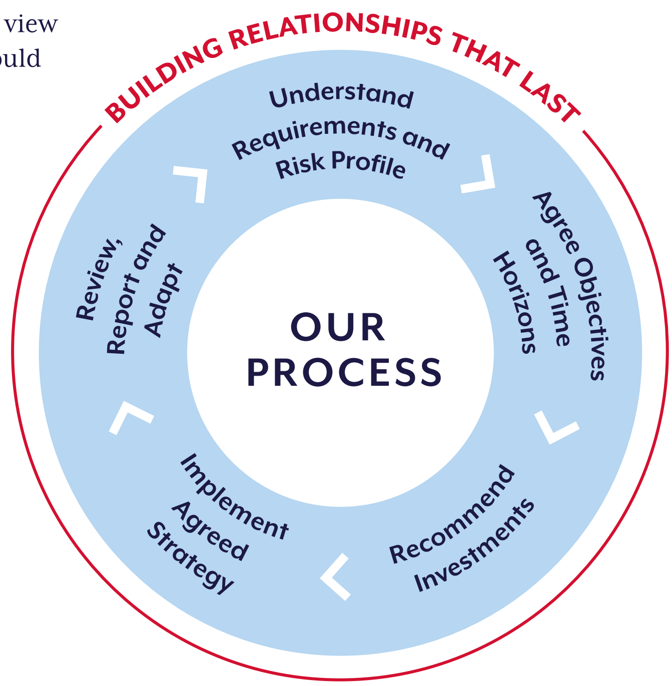
APPLY SHORT-TERM VIEWS
Dynamically manage individual investments to achieve your strategic goal.

A close working relationship for your peace of mind

Above all, it's the personal bond between client and investment manager that sets us apart. We insist on the highest levels of service for our clients and you will have direct access to a dedicated investment manager and their team.

We'll keep you regularly updated about your investments with an option to receive reports by post or electronically. Through your secure online client account, (My Charles Stanley), you can view your investments online, as well as pay funds into your account, and send us secure messages.

If you're curious about Charles Stanley and want to get a feel for how we could help, then let's have a conversation. We'll give you a balanced view with no need to commit. And, if you would like to go further, we're sure you will find it a straightforward experience to open or transfer an account.



Ready wherever you are

With a network of over 20 offices across the UK, you can be sure to find a dedicated investment manager and team within reach.

We can meet you locally anywhere in the UK, at one of our regional offices or our Head Office in London. And you can contact us in whatever ways you prefer: in person, by video call, phone, post, email or our the My Charles Stanley online account.

So if it's not convenient for you to meet face-to-face, you still have a wide range of options for maintaining the working relationship that's right for you.

OUR OFFICES

South West

Bath
Bournemouth
Exeter
Plymouth
Southampton

South & South East

Cambridge
Eastbourne
Guildford
Ipswich
Leigh on Sea
London
Oxford
Tunbridge Wells

Mid-England & Wales

Birmingham
Cardiff
Leicester
Norwich

Scotland, Northern Ireland & the North of England

Aberdeen
Belfast
Edinburgh
Glasgow
Leeds
Manchester

Our commitment to you

We promise to focus on you. To put your interests before any opportunity to promote our services. To listen carefully and provide what's right for your situation and goals.

We promise to work with you in whatever way suits you best. And we promise to keep on supporting you over the long term, doing everything we can to safeguard and help you achieve your financial objectives.

This is the Charles Stanley promise, and this is my personal pledge to you.

Paul Abberley
Chief Executive

We are here to help, please visit us at
www.charles-stanley.co.uk

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The value of your investments, and any income derived from them, can fall as well as rise and investors may not get back the original amount invested. Past performance is not a reliable guide to the future.

www.charles-stanley.co.uk

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