



Make sure your investments are working for you

Get a better insight into
how you are managing
your investments

Our Foundation Investment Review Service

A simple outcomes-based review of your portfolio of investments. For an annual fee of £360, our financial professionals will help you understand your investments, to provide you with better insight into their performance and risk.

1 Information

We will gather information on all your investments held with us. To make best use of the service we would ask that you supply details on your investments held with other providers, but it is not compulsory.

2 Report

We will provide you with your Investment Review Report, which will include:

- ▶ Value of all your combined investments
- ▶ Performance of your investments
- ▶ Portfolio breakdown, split by asset class, geography and sector
- ▶ Risk level of your investments
- ▶ Details of your holdings

3 Review

We will arrange a review meeting with you and one of our financial professionals, where we will discuss the report with you and what actions you wish to take.

4 Implement

At the end of the review, you will have a clear understanding on how your portfolio is invested and how it is progressing. If it is identified that changes are required as a result, we will discuss the options available to you which could include a referral to another division of Charles Stanley such as our Advisory Dealing service.

What it is not?

The review process is not a top to bottom review of your financial position and circumstances.



How can our Investment Review Service help you?

Use our expertise to give you better insight into your investments.

- ▶ Get a comprehensive annual review of your existing investments analysing performance and highlighting the level of risk the portfolio is exposed to.
- ▶ Allowing you to get a holistic view of your investments, split by asset class, geography, and sector.
- ▶ Access information to help you understand whether your investments are aligned to the amount of investment risk you are willing and able to take.
- ▶ Allowing you to make informed investment decisions to structure your portfolio to meet your needs.
- ▶ Your annual review will not provide you with investment recommendations but we will discuss the options available to you.

This review is ideal if you:



You don't have the time to actively review your investments.

Get a report annually to help you analyse performance and risk exposure, so you can make any necessary changes.



You are looking for additional guidance.

If you are comfortable in managing your investments but want more information about your portfolio to help you decide what to do next.



You want to ensure your investments are on track.

If you want to get better insight into the performance of your investments and get a view of your portfolio make-up and asset allocation.



Are your investments meeting your expectations?

Whether you have had a change in personal circumstance, or you want to ensure your investments will support your retirement, this report can help inform you if your portfolio is meeting your expectations.

It is important your investments are reviewed regularly to make sure they are in shape to meet the changing circumstances and the challenges ahead.



Next steps

Keeping track of your investments is key to ensuring your goals and ambitions are achievable. Incorporating a regular review will highlight where adjustments to your portfolio may be necessary.

For more information, or to arrange your free initial call, please contact us on 01482 861 455 or email info@csinvestmentchoices.co.uk

Your notes

The following pages have been left blank for your notes.

Your notes

Your notes



About Charles Stanley

With over 200 years of experience, Charles Stanley has created financial security for many tens of thousands of people. Through bespoke investment management and financial advice, we continue to evolve to help our clients meet their goals by understanding what wealth means to them.