

Helpsheet

Discretionary Fund Management

There are two types of fund management available to clients – these are advisory and discretionary fund management.

An alternative to advisory fund management is a discretionary fund management service. Menzies Wealth Management does not offer this service directly to clients.

Menzies Wealth Management does however work with a panel of blue chip discretionary fund managers and will on request arrange an investment beauty parade for clients. The fund management groups we select for the beauty parade will have different styles and approaches to investment for clients to consider.

A member of the Menzies Wealth Management team will arrange the beauty parade and assist with the decision making process that follows. If clients wish, Menzies Wealth Management will attend future investment review meetings.

Typically a minimum investment of £500,000 is required by most discretionary fund management groups.

Disclaimer

This publication has been prepared only as a guide and is not intended as advice. No responsibility can be accepted by Menzies Wealth Management for any loss from acting or refraining from acting as a result of any material in this publication.

