



Investment Research Process

Creating and Preserving Wealth

INDEPENDENT ANALYSIS

Taxbriefs – The Professional Adviser’s Factfile	Historical data and analysis.
Citywire	Internet and paper based access to top Fund Managers and regular information.
Citywire Cabinet	Face to face Fund Manager meetings.
Asset Allocation Quarterly	Specialist information including fund and Fund Manager profiles.
O&M Pension Profiler	Compares charges and performance for all providers and all funds.
Aequos	Independent DNA system.
S&P Micropal	Standard and Poors used for fund reporting and analysis.
Portfolio Modelling	By fund, by manager, by sector, by geographical area, via internal and external systems.
Money Management	Actual results, regular surveys, articles on product development and fund research.
Tax Efficient Review	Monthly publication looking at VCT, EIS and Film Partnerships.
Tax Shelter Report	Monthly analysis of tax shelters.
Morningstar	In depth analysis, news and real time valuations.
Professional Pensions	For the pension specialist, includes surveys of all major pension schemes both private and public.



Financial Adviser	General publication.
Money Marketing	General publication.
New Model Adviser	Specialist publication.
Investment Week	Specialist publication.
Investment Adviser	Specialist publication.
Investment Trusts	Specialist publication.
International Financial Adviser	International tax and investment news.
Bloomberg Money	Monthly information for the private investor.
Fund Strategy	Weekly Fund Manager opinions and comments from the industry.
Fund Manager Meetings	We try to see all the fund managers that we use at least once a year.
MoneyFacts	Monthly publication and daily website. Useful for cash rates.
Investment Life & Pensions MoneyFacts	Monthly publication with plan details, analysis and fund performance.
Business MoneyFacts	The business finance bible.
Asset.tv	On-line video library of fund manager interviews and views of world markets, asset allocation etc.
Wealth Magazine	Monthly assessments of wealth management solutions.
Financial Times	Daily newspaper for our business.
The Internet	Various sites from specialists to investment houses, accessed regularly for up-to-date product and fund information, fact sheets, prices and valuations. Also used for financial strength assessments, for understanding risks and for corporate profiles.

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