

Company Profile



netwealth

Wealth management as it should be

Wealth management | Pensions & ISAs | Financial planning



Important Information

This document is intended for professional financial intermediaries and is not suitable for retail investors.

Netwealth Investments Limited is authorised and regulated by the Financial Conduct Authority with firm reference number 706988.

When investing your capital is at risk. The value of investments may go down as well as up, so you could get back less than you invested.

Netwealth offers advice restricted to the services provided, and does not provide independent advice across the market.

Netwealth is covered by the Financial Services Compensation Scheme (FSCS). In the event that we have stopped trading or are declared to be in default and cannot meet our obligations, a client may be able to claim compensation. This depends upon the type of business and the circumstances of the claim. The FSCS offers different levels of cover for different types of business. Most types of investment business are currently covered for 100% of the first £85,000. Further information is available from the FSCS website (www.fscs.org.uk).



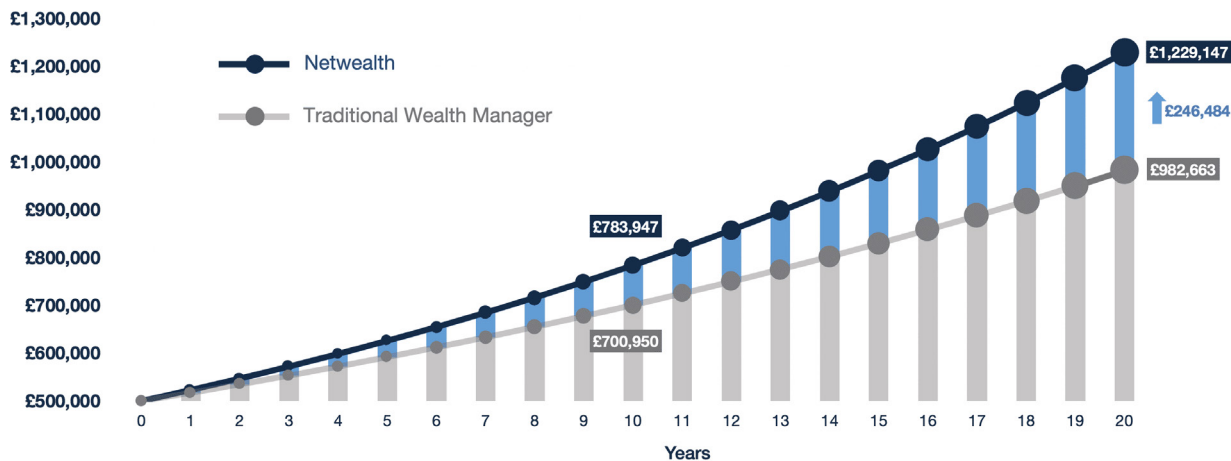
About Netwealth

Netwealth was founded in 2015 by Charlotte Ransom, former Partner at Goldman Sachs and Thomas Salter, former Managing Director at JP Morgan in response to the need for improved discretionary wealth management services. Their market research found that a core financial consumer base was either under-invested or unhappily invested due to concerns over cost, transparency, performance and quality within discretionary wealth management.

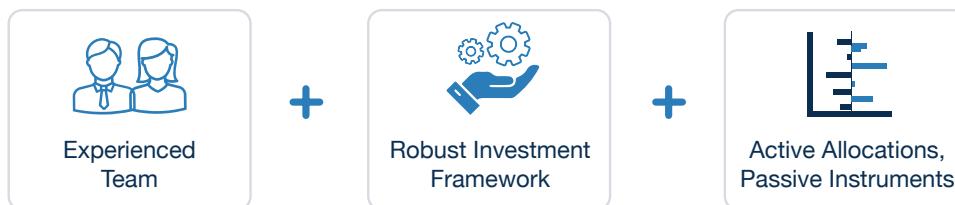
With this in mind Charlotte and Tom set about combining the best elements of traditional wealth management and the benefits of cutting-edge technology to create Netwealth and deliver *discretionary wealth management as it should be*.

Smaller fees make a big difference

It is remarkable the impact that lower fees can have on the likelihood of clients meeting their financial goals. At Netwealth, we believe in the long-term value of keeping the total cost of investing as low as possible and passing the compounding benefit of this on to clients.



Centrally managed portfolios



Netwealth’s experienced investment team implement a robust investment framework to deliver high quality, globally diversified portfolios across seven risk-return profiles. Our centrally managed portfolios represent the ‘best thinking’ of the investment team, resulting in higher expected returns for clients.

Time in the market, not timing the market

Netwealth’s ambition is to deliver attractive portfolio performance over the medium- to long-term in order to give client the best chance of meeting their investment goals. Our views are based on long-term strategic thinking, so we can be more patient for the investment team’s views to be rewarded. A resistance to excessive trading also enables us to minimise unnecessary, attritional costs.

Diversification

The purpose of Netwealth’s strategic allocations across different asset classes and regions is to establish a portfolio mix that offers the best chance of meeting client expectations through the investment cycle. By providing diversified exposure to international capital markets we aim to maximise returns for each of the portfolios. We consider a broad range of investible asset classes to provide diversification of exposure to assets that perform well in different economic and market environments.



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