Rutland Investment Managers Gold Service

GOLD SERVICE is ideal for those who require a tailored approach to their independent financial advice.

What is included in the Gold Review Service?

Records - We maintain a full and complete financial services file throughout the year.

Deal with Companies - We deal with any queries from insurance, investment or pension companies throughout the year.

Deal with Authorities - We can deal with any tax and financial issues relating to any investments you have transacted where required throughout the year.

Pro-Active Portfolio Management - We will rebalance your investment portfolio annually to ensure that it remains in line with the agreed investment strategy.

You will have online access to your investment portfolio to include high level valuations, and the facility to trade stocks and shares if required. We will monitor the performance of the funds you are invested in, together with changes to their managers, and make recommendations when we feel it is appropriate to do so.

We will immediately contact you if your investment portfolio breaches your risk tolerance and advise on any required remedial action

Monitor Law and Tax - We monitor changes in law and taxation throughout the year and notify you if we believe action is needed.

Working with other Professionals - We will communicate effectively with other professional advisers as required. We will provide any other professional adviser with copies of your quarterly valuations and/or our advice with regard to tax mitigation, where requested to do so. We will introduce you to other suitable, and vetted, professionals as needs arise.

Review - We review your investments made on our advice at quarterly intervals and offer a face to face meeting to discuss your portfolio twice a year at no additional cost.

Telephone - We offer you unlimited telephone contact - you can telephone us at any time with no extra cost without worrying about huge additional charges. We will prioritise your queries and reply within 48 hours.

Valuation –Our quarterly valuation will give you a full written report including detailed valuations of transactions undertaken and an overview of the performance and investment returns compared to agreed benchmarks.

Newsletters - We issue our informative, regular newsletters both by email and by post at no extra cost

Who should consider Gold Service?

Any person, family or organisation who has significant values in pension funds and investments, excluding their main residential home, should consider our Gold service.

What is the cost?

Our Gold Service is charged at 1% p.a of the valuation of your portfolio.. You can elect to either pay this charge by fee or alternatively we can arrange for this to be deducted from your plan by the product providers.

Rutland Investment Managers Silver Service

SILVER SERVICE is ideal for those who require an annual review of their financial, taxation, pension and investment position.

The Silver Review Service is our most popular service.

Silver Service entitles you to an annual review of your investments at intervals of twelve months on a date agreed with you.

Who should consider Silver Service? In our opinion every person, family or organisation should have a review of their financial position at least once a year.

What is included?

Records - We maintain a full and complete financial services file throughout the year.

Deal with Companies - We deal with any queries from insurance, investment or pension companies throughout the year.

Deal with Authorities - We can deal with any tax and financial issues relating to any investments you have transacted where required throughout the year.

Monitor Investments - We monitor changes in investment markets throughout the year and will highlight any recommendations or alterations to you at your plan review.

Monitor Law and Tax - We monitor changes in law and taxation throughout the year and notify you if we believe action is needed

Advice - We give ongoing advice and make changes to your portfolio where needed once a year.

Telephone - We offer you unlimited telephone contact - you can telephone us at any time with no extra cost without worrying about additional charges.

Valuation - We give you an annual portfolio valuation once a year. This will include a breakdown of Investment funds, a valuation of transactions and an overview of the performance and investment returns. In addition you will receive a password to allow you access to our on-line valuation system whereby you can monitor the progress of your investment. The website address is www.rutland-investments.co.uk.

Meetings - We offer silver clients an annual review meeting or a remote consultation to discuss ongoing changes or recommendations with regard to your portfolio. Additional meetings or full remote consultations with an adviser are chargeable at our standard rates.

Newsletters - We issue our informative, regular newsletters both e-mail. Please inform us of your e-mail address if you wish to receive our regular newsletter.

Who should consider our silver Service?

Any person, family or organisation who has a capital investment in either a pension or investment contract should consider our Silver service.

How much does it cost?

Our Silver Service is charged at 0.5% p.a of the valuation of your portfolio.

You can elect to either pay this charge by fee or alternatively we can arrange for this to be deducted from your plan by the product providers.

Rutland Investment Managers Bronze Service

BRONZE SERVICE is designed to accommodate clients who wish to access a transactional service. We will undertake to assess your needs and requirements prior to recommending suitable advice or products.
This service is ideal for those who **do not** require a full yearly review of their financial, taxation, pension and investment position and **do not** want ongoing advice. We will however retain records of your details and transactions on file.

Who should consider Bronze Service?

Every person, family or organisation should have a trusted financial adviser who can act on their behalf. Individuals with no significant savings and pensions to date can utilise this service and move up to a higher service model if and when appropriate.

What is included?

Records - We maintain a full and complete financial services file throughout the year.

Deal with Companies - We deal with any queries from insurance, investment or pension companies throughout the year.

Deal with Authorities - We can deal with any tax and financial issues relating to any investments you have transacted where required throughout the year

Monitor Law and Tax - We monitor changes in law and taxation throughout the year.

Transaction Service - You can request ad-hoc consultations to undertake further financial transactions or receive advice.

Telephone - You can telephone us at any time free of charge.

How much does it cost?

For the Bronze Service we do not make any make any annual charge.
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