

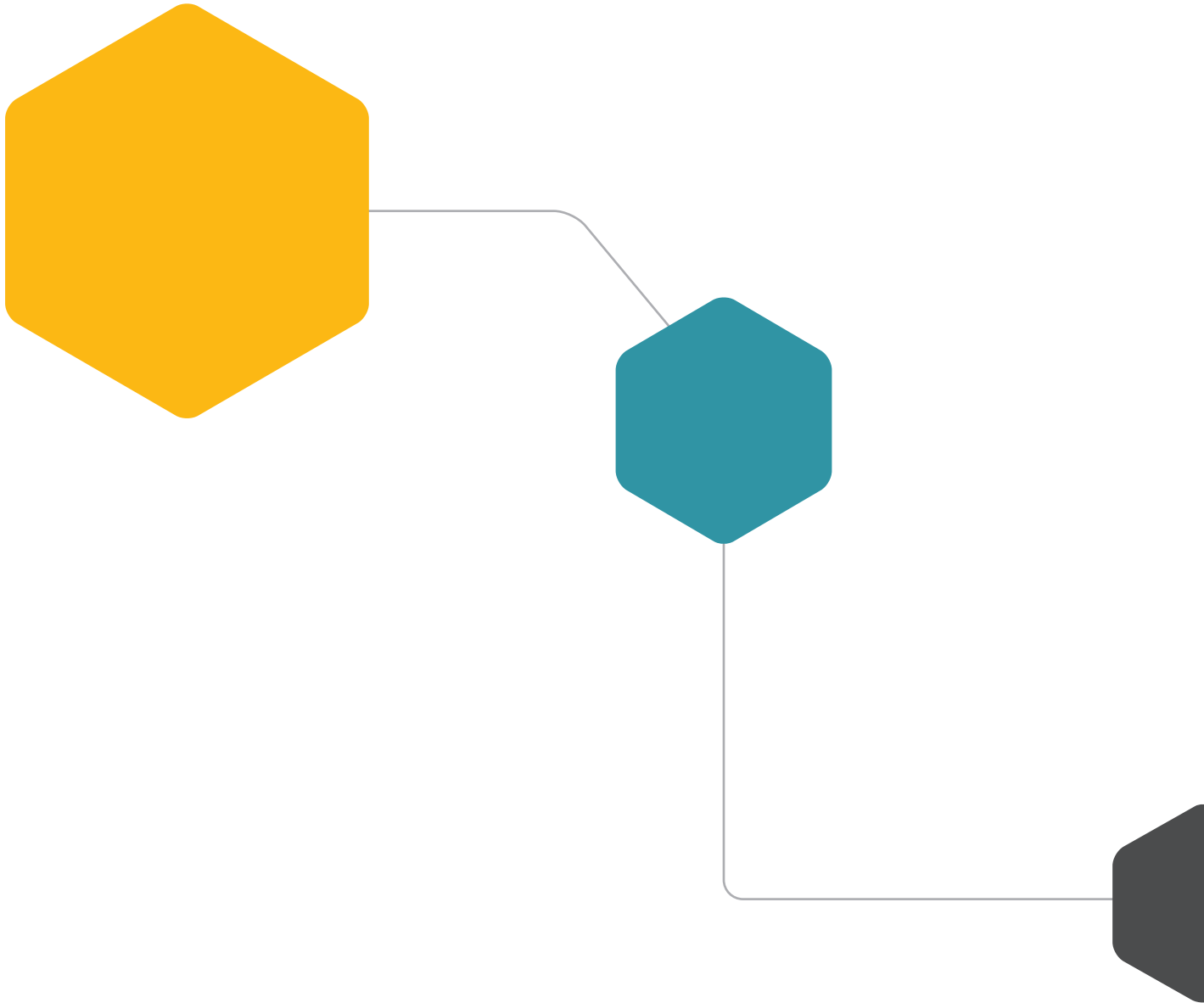
# YOUR PORTFOLIO SERVICE

YOUR CLIENTS, YOUR BRANDING, YOUR PORTFOLIO SERVICE



Redmayne  
Bentley

Since we were founded in 1875 the market has changed enormously and we have changed with it. We have developed as a business while ensuring we stand by our key values of delivering sustainable partnerships and first-class client service.



# Created with you in mind

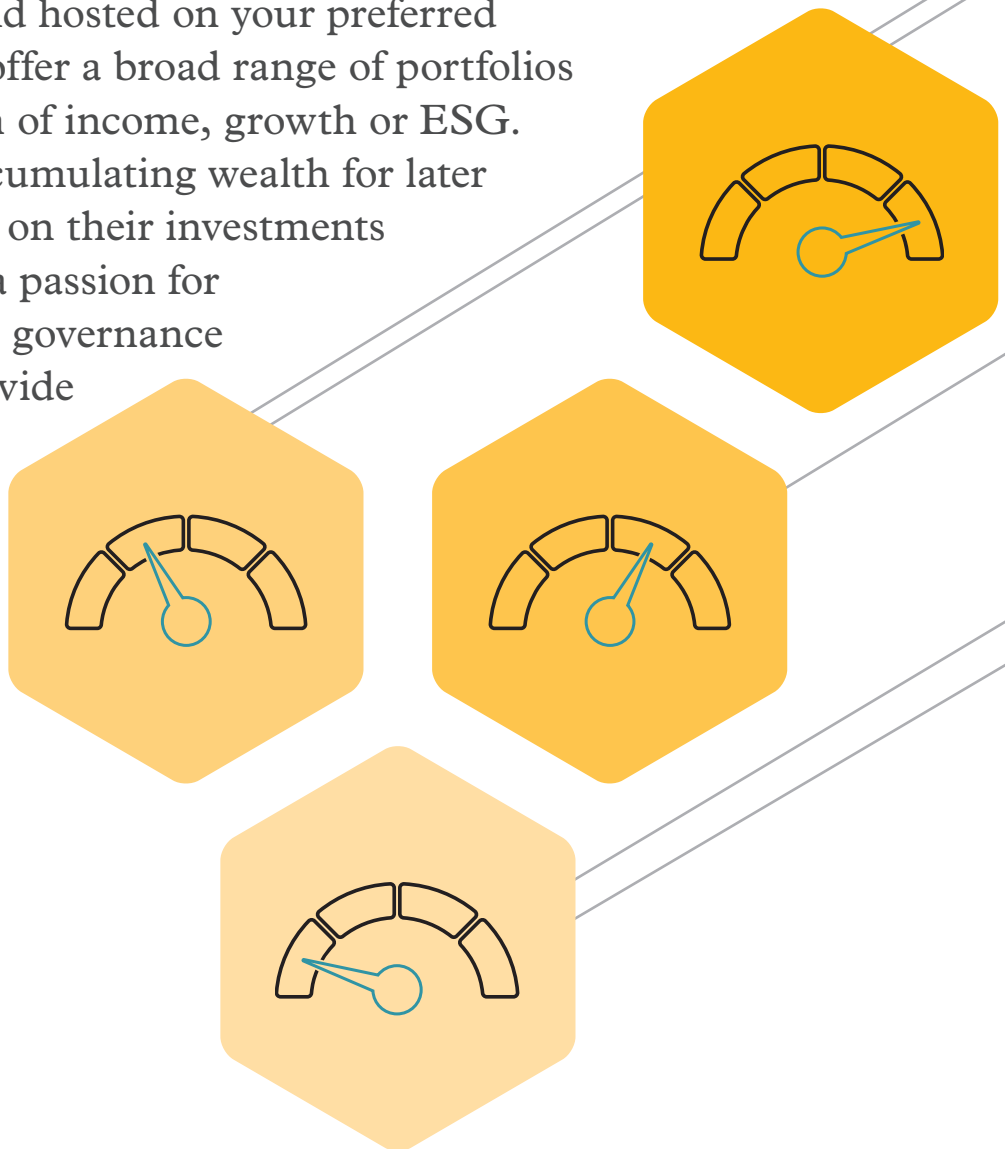
We have designed this service to address the ongoing investment management needs of your business; we will construct a range of portfolios in partnership with you that meet your clients' requirements. We believe this enables you to reduce the regulatory risk and operational burden within your business while being able to offer a market leading white-labelled investment management solution to your clients. For you, we offer a truly personal service as we remain invisible to your clients.



# Our service

The service is designed to complement your existing business practices, providing you with a centralised investment proposition that will support the conversations you have with your clients and help reduce the ongoing administration and resource associated with fund and investment selection.

We work closely with you to create a range of portfolios in line with your risk profiling methodology; these portfolios are then white-labelled and hosted on your preferred platform/s of choice. We offer a broad range of portfolios that have the primary aim of income, growth or ESG. Whether your client is accumulating wealth for later life, looking to drawdown on their investments during retirement or has a passion for environmental, social and governance investing, we strive to provide solutions that cater for all requirements.



## ESG

# Income



# Growth

# The investment solution

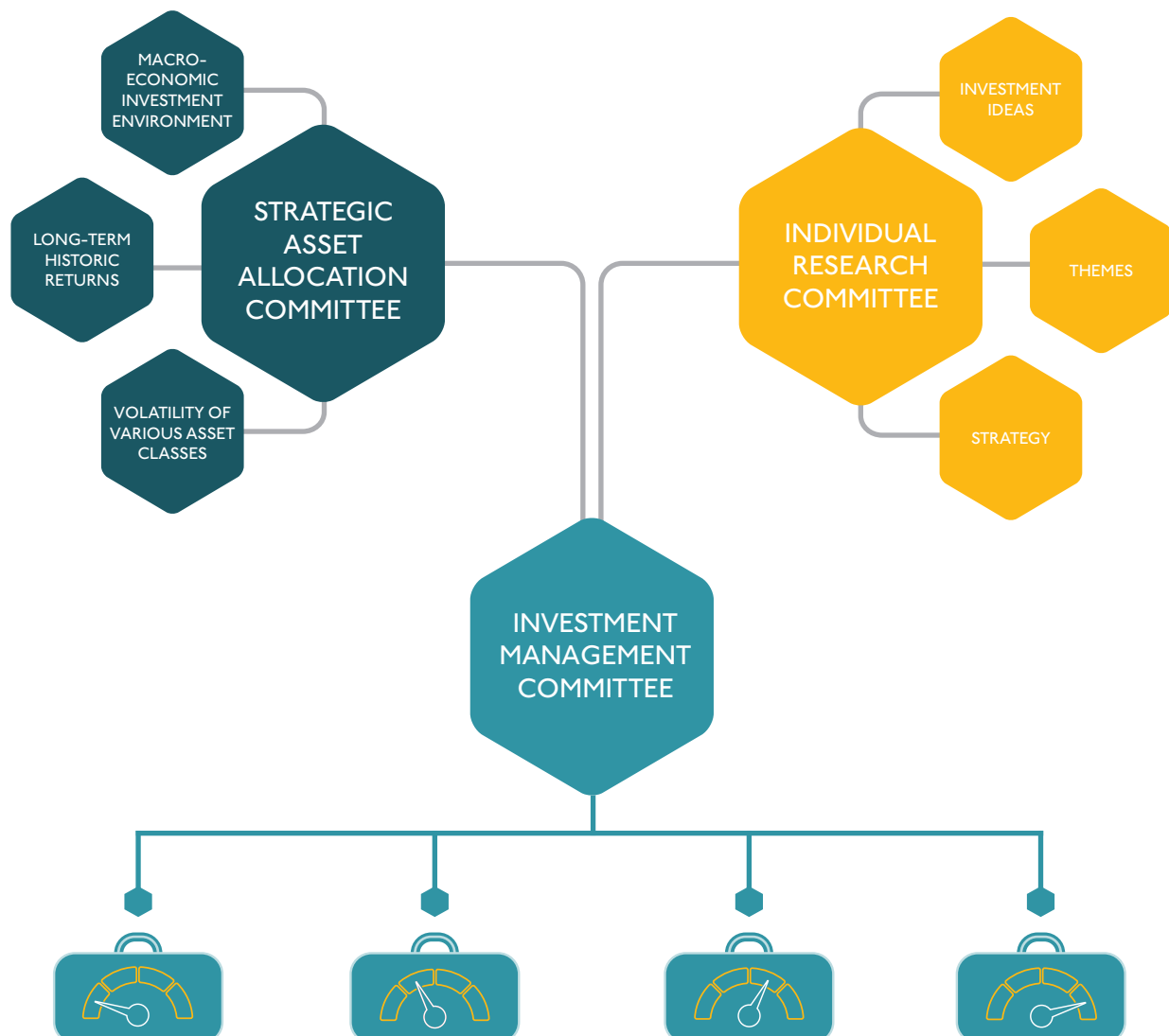
We believe in an active approach to investing, concentrating on achieving consistency of returns by utilising real assets.

We don't just use collectives or passive funds which track the market, like many other providers; instead, we utilise the 'best-in-class' fund managers where we believe it adds value to the portfolio. We are, therefore, able to build and maintain truly diversified portfolios that aim to deliver growth over the long-term using a full asset class mix. We believe building portfolios is about getting the right balance to achieve the desired outcomes.



Our Strategic Asset Allocation Committee provides top-level asset allocation for our main risk profiles while our individual research committees undertake the research and arrange direct meetings with companies and fund managers.

Our dedicated investment management committee harnesses the experience and depth of research made available directly from other committees, to carefully construct portfolios in line with their designated risk profiles.



# White-label literature

As part of this service, we will produce a client brochure using your own branding, along with a range of portfolio factsheets which will detail the portfolios available, including the risk characteristics, time horizon, objectives, strategic asset allocation and the type of assets used to construct the portfolios.





 **abrdn**

**ascentric**

 **AEGON**

 **AVIVA**

**transact** 


# What our partners say...

“

Redmayne Bentley has played a pivotal role in the development of our firm. 2020 has presented many challenges to advisory firms and I truly believe that Redmayne Bentley's pro-active approach in managing our clients' money through these volatile times has greatly enhanced the relationship that we have with our clients. Our investment manager has taken the time to understand our company's ethos and ambition, carefully crafting portfolios to meet our clients' needs. Their professionalism and dedication to deliver a service of excellence has forged a relationship of integrity and trust, this is paramount to us as Stewards of Capital.

HEAD OF WEALTH MANAGEMENT, NATIONAL ADVICE FIRM

”

A decorative graphic consisting of several hexagons of different colors (teal, dark grey, yellow, light grey) connected by thin grey lines. The lines form a path that starts from the top right, goes down, then left, then down again, then left, then down, then left, and finally down to the bottom center. The hexagons are placed at various points along these lines.

“ Our Investment Manager and I have a great working relationship, with me being able to work on the financial planning and strategy for my clients and Redmayne Bentley being able to monitor the investments and manage them within the agreed parameters. As we deal with a number of high-net-worth clients, Redmayne Bentley’s ability to build bespoke portfolios fits the needs and expectations of my clients. Our Investment Manager is very professional and courteous. ”

DIRECTOR, FINANCIAL SERVICES FIRM

# Delivering performance...

We are delighted that the firm has been recognised by ARC (Asset Risk Consultants) and City of London Wealth Management Awards in 2022.



2022

REDMAYNE-BENTLEY LLP

**AWARDED BY** **ARC**  
ARC RESEARCH LIMITED

# Ownership, Organisation and Structure

Established in 1875, Redmayne Bentley is one of the largest independent private client investment management and stockbroking firms in the UK with over £7bn of client assets and £2.8bn of funds under management. Redmayne Bentley is a limited liability partnership with 76% of the firm's equity held by six main Partners, all of whom are actively involved in the running of the firm. The remaining 24% is held by staff members through a private limited company.

## NET PROMOTER SCORE



72.1%

## MEASURING OUR CLIENTS' EXPERIENCE

\*A measure of clients likely to recommend Redmayne Bentley.  
As at 31st March 2022, out of 7,195 client responses.

# Office Locations Nationwide



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# ARC Award

ARC provides independent investment consulting, manager research and performance reporting to private clients, charities, family offices, professional trustees and their trusted advisers. The 3D Award is an independent endorsement of an investment manager's commitment to the principles of transparency, engagement and integrity.



This brochure is made available only to 'Investment Professionals' within the definition of Article 19 of the Financial Services and Markets Act 2000 (Financial Promotion) Order 2005 and having professional experience of the subject matter.

