

Key notes



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JM Finn & Co – Discretionary Investment Management – September 2011

Discretionary investment services for professional advisers and their clients

- JM Finn & Co was founded in 1945 and is one of the UK's leading investment management companies
- Employ 280 staff across offices in London, Bristol, Leeds, Bury St Edmunds, Ipswich and Cardiff
- As at April 2011 £6.3bn funds under management or administration
- A comprehensive service for private clients, trusts, charities and pension funds
- Portfolio construction across a range of securities, including regulated collectives, ETFs and direct equities/ fixed interest
- Tailored Platform Solution (TPS) aimed at IFAs looking to outsource their investment management via wrap platform

Investment ethos

- Investment decisions must be driven by the requirements of the client, supported by the convictions of the Investment Manager
- Client portfolios managed on the basis of their:
 - ◊ Investment objectives
 - ◊ Risk appetite
 - ◊ Investment restrictions
 - ◊ Cash requirements
 - ◊ Tax considerations
 - ◊ Other special instructions

Range of services

- Discretionary investment management
- Portfolio advisory service
- Individual Savings Accounts (ISAs)
- Pension investment management
- Trust investment management
- Charity investment management
- Investment funds
- Probates
- Cash management
- Nominees
- Online access to view portfolio / holdings

JM Finn & Co

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