



Wealth Management Case Study 2

Are administration costs eating away at your investments?

Whatever the size of your portfolio, it *is* possible to have more control over your investments. It is all too easy for the administration of the portfolio to become unmanageable and the associated costs can eat away at your investments. It is possible to keep track of where your funds are and have more confidence in knowing exactly where your money is invested.

Mr & Mrs Williams were approaching retirement and, like many of our clients, wanted to ensure that their range of pensions and investments were aligned to meet their retirement goals.

Following a review of their existing arrangements with the Hillier Hopkins Wealth Management team, their new investment portfolio is significantly more tax efficient and they are now paying much less than they were in ongoing investment charges.

For example, Mr & Mrs Williams had a sizable portfolio with a major high street bank whose management and administration charges amounted to nearly 3% per annum. These costs were reduced to an average of 1.25% per annum across the portfolio, including the cost of retaining Hillier Hopkins for ongoing investment reviews. On a portfolio of £600,000 this would represent a saving of approximately £10,500 per annum.

The implemented recommendations gave a much greater degree of transparency and control to Mr & Mrs Williams affairs.

The above is a genuine case study with some key details adjusted to protect the privacy of the client.

This Wealth Management service is not for everyone. Our best work is often undertaken with clients over the age of 50 with investable assets of over £500,000. However we have many clients that fall outside these criteria for whom we are able to provide a comprehensive service. Those who get most value out of this service are independent minded individuals or couples who are concerned regarding the stewardship of their capital who appreciate good value services.

If you would like a fresh perspective on your financial position from genuinely independent professionals please contact Ben Sherwood on 01442 220713 or email ben.sherwood@hhllp.co.uk

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