

Blackfinch Asset Management

Reasons to Partner



Commitment and Exclusivity

We provide solutions to complement and enhance the adviser's business model. Our adviser partners own and control their client relationships. We work exclusively with adviser firms and our portfolios are only available through financial advisers. We're also one of the few asset managers that doesn't have in-house financial advisers.



Responsible Investor

Our solutions can meet adviser and client demands for offerings with responsible values. In building long-term future prospects, we assess multiple factors in the investments we make across all of our portfolios. We are proud to be a PRI signatory



Independent Investment Specialist

We're part of an independent company with no ties to parent banks or insurance companies. This means we're free to execute on our best investment thinking without fear of conflict. As a result you and your clients can benefit from an unbiased, whole-of-market approach.



Clarity on Investment Journey and Targets

We provide portfolios focused on delivering returns targeted at beating inflation. We use this as the metric that is most clear and relevant to investors. This can aid your clients' understanding so they can see how the portfolios relate to their objectives and know what to expect.



Wide-ranging Investment Remit

Clients continue to seek diversified investment opportunities. Here there's scope for us to select from a vast number of investments, covering different strategies. We invest globally and each portfolio holds a wide range of investments, covering equities, bonds, alternatives and property.



Alignment with Adviser Processes

Our solutions offer simplicity, through six portfolios with clear objectives, also ensuring regulatory alignment; and accessibility, through extensive platform access and no minimum or maximum investment levels. There's also choice, with the option of wrapped/unitised or unwrapped structures, or a combination.



Tailored Service

We provide a tailored service, adapting to suit different requirements. Our partner firms and their clients can benefit from our help and support across many areas. Work can cover whatever is needed by each business. This runs from revenue, profitability, efficiency, and regulation to branding, environmental, social and governance (ESG) propositions, and client communication.



Partnership Approach

We're committed to forming meaningful long-term partnerships with advisers. This runs from the initial in-depth consultation, and your extensive due diligence, to working with ongoing flexibility and direct communication. We offer tools and collateral to support the advice process. From co-hosted events to co-branded literature, we're here to help adviser firms grow.

IMPORTANT INFORMATION

Capital at Risk. Blackfinch Asset Management Limited is an Appointed Representative of Blackfinch Investments Limited which is authorised and regulated by the Financial Conduct Authority. Registered address: 1350-1360 Montpellier Court, Gloucester Business Park, Gloucester, GL3 4AH. Registered in England and Wales company number 11639647.

Signatory of:

