

Blackfinch Asset Management

Outsourced Multi-Asset
Investment Solutions for
Forward Thinking Firms



Signatory of:

Meet the Team



Mark Keogh
Head of Asset Management



Gareth Deacon
Head of Multi Asset



Dr Dan Appleby
Chief Investment Officer
(Listed Investments)



Alice Bollen
Investment
Operations Manager



Jordan Kent
Internal Business
Development Manager



Josh Clayton
Product Specialist

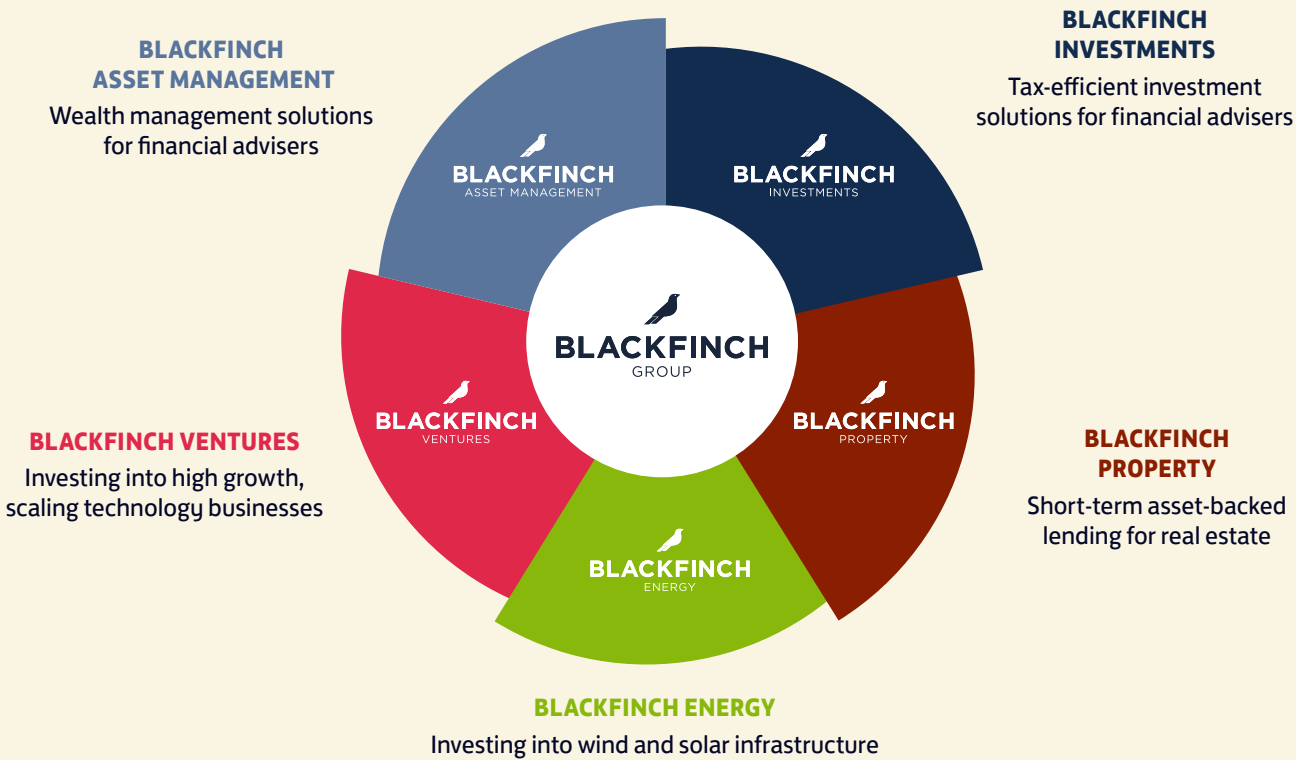
How important are performance, costs, and service to you when choosing the right partner for outsourcing your investment strategy? Does your current investment partner meet manufacturing requirements? Do you want to work with a specialist that has expertise across tax-efficient products, real estate, and a broad range of investment solutions? Someone who can help you save time while also increasing the value of your business?

If you’ve been asking yourself these questions we’d love to speak to you. At Blackfinch, we believe in close partnerships with advisers, offering a range of services designed to support your business and your clients. Read on to get to know us.

About Blackfinch Group

Blackfinch Asset Management is part of Blackfinch Group, an independent investment specialist with a heritage dating back over 30 years.

At Blackfinch, we’re committed to helping individuals, communities and businesses to thrive. As a growing investment group, we manage funds on behalf of retail investors and their financial advisers, who share our belief that investing has the power to do a world of good.



Blackfinch Asset Management Managed Portfolio Service

Our Managed Portfolio service offers straightforward investment portfolios, with clear, understandable objectives

- Available on 15 platforms
- 5 year+ track record
- Access to an expert team
- Relevant and market-timed communications









Blackfinch Asset Management Tailored Portfolio Service

Your own-brand range of diversified, managed portfolios, curated to meet your firm and client outcomes. A truly tailored approach.

For firms where a pre-defined MPS range doesn’t quite meet the needs of their clients, or they are looking to create a uniquely competitive offering, we work in partnership to provide a TPS. Our TPS is a service where you set the specifications and we provide the resources to deliver the strategy.



 Input into asset allocation	 Value assessment achieved through tailored pricing	 Tailored communications and literature
 Dedicated investment committee with quarterly updates	 Mapped to chosen risk profiler	 Access to investment team

What next?

No two adviser firms are the same, and our product range and support reflects that. Speak to one of our team today to find out how we can help you achieve your business goals.



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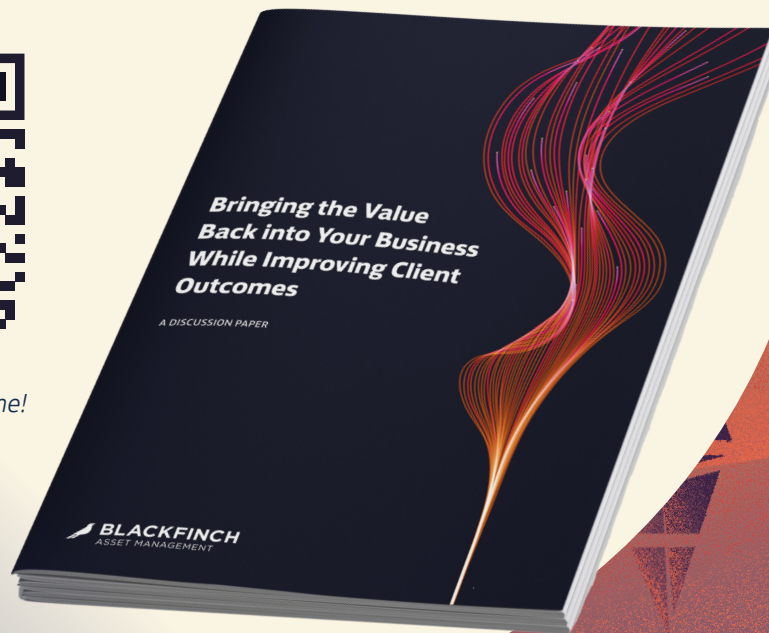


Scan here to view and download
our helpful whitepaper

“Bringing the value back into your business, while improving client outcomes”



Scan me!



IMPORTANT INFORMATION

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