

# Mercater for Private Client Portfolios

Few people have the time, knowledge, relevant experience, or indeed, the desire to run their own investment portfolio. Many people hold an array of investments, acquired over time, which offers little in terms of a well balanced investment portfolio but generates an inordinate amount of paperwork each year, all of which needs to be retained for that time of the year when we have to fill in our tax return.

At Mercater we have a solution to this annual headache. Mercater's Discretionary Managed Service allows you to hand over the running of your portfolio to a team of investment experts with a wealth of investment experience. We can deal with most investment scenarios regardless of size and complexity in a personal manner to suit each client's individual needs.

Your appointed investment manager will be keen to meet you and discuss your investment objectives and attitude to risk before constructing a portfolio to meet those objectives. Crucially, your portfolio is then carefully monitored over time and adjusted where necessary. You will be kept informed of the progress of your portfolio and will have regular access to your appointed investment manager. By compiling all of your financial information in one document we can make life so much simpler when the time comes to complete that tax return.

Mercater's Discretionary Managed Service is available to private clients, Trustees, and corporations, and can be accessed directly or within a range of investment vehicles including pensions, ISA's and Offshore Bonds.

If you would like to know more about how Mercater could help with your investment portfolio please do not hesitate to contact us:

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