

Discretionary Managed Service – The Reasons Why

At Mercater Capital Management we aim to provide clients a truly tailored Discretionary Managed Service with an emphasis on high levels of service. Each client will benefit from a portfolio carefully constructed to reflect their personal circumstances and financial requirements. Our specialist investment management team allows Mercater to deal with most investment scenarios, regardless of size or complexity, in a personal manner to suit every client's needs. We feel that Discretionary Management Service offers many benefits over traditional portfolio management:

- Your client's investment portfolio is tailored to meet their specific investment requirements and is determined by their attitude to risk following a review of the client's objectives.
- Each portfolio will be monitored on a regular basis by an experienced team of investment managers.
- Mercater's "boutique" approach to investment management ensures all clients receive a highly valued personal service.
- Your client's portfolio is constructed and managed by a named and accessible investment manager who will be only too happy to discuss the portfolio over the phone and attend regular meetings to monitor the evolving needs of your client and the ongoing performance of the investment portfolio.
- A discretionary fund manager has the ability to adapt a portfolio to changing market conditions swiftly and efficiently, thereby taking advantage of investment opportunities as they arise, without having to seek a client's authority each time he feels it appropriate to make changes to your portfolio.
- Mercater's investment in collectives helps to diversify risk and provides access to specialist fund managers across a variety of asset classes.
- Mercater can access funds at institutional rates and does not take commissions from underlying funds, thereby ensuring that your portfolio is managed on a very cost efficient basis.
- Investments into a Discretionary Managed portfolio generate much less paperwork than a comparable balanced share portfolio and will therefore make the annual process of accounting to HMRC all the more simple.

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