

# Built not bought

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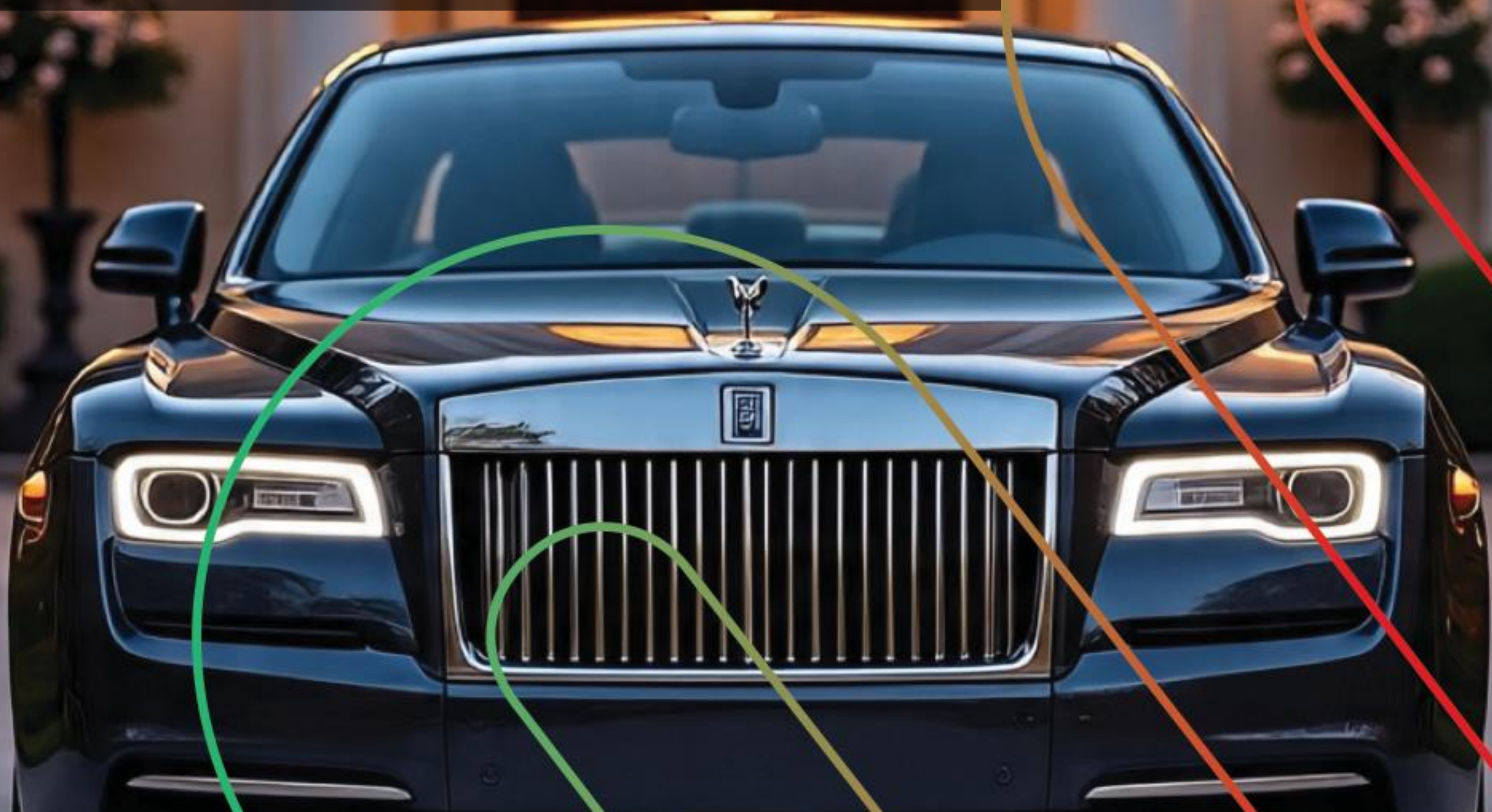
Disclaimer: May contain smart investing and mild horsepower



“44 000 colours  
Wood from one tree  
No two are alike”

# The story of Rolls-Royce

m





<https://vt.tiktok.com/ZSBtgqpP5/>



# Meet the CREW

## Client

= Car owner

## Adviser

= GPS and driver

## Portfolio manager

= Mechanic and pit crew



# The CLIENT



Confidence | Clarity | Control

# Consider this

Bespoke

*VS*

One size fits all

Direct ownership

*VS*

Pooled

Direct line

*VS*

Factsheets

Transparency

*VS*

TER

Control

*VS*

Top 10 holdings

CGT

Hedging

m



# The ADVISER



# Six-step financial planning process



**When cars had the GPS  
and the sound system in  
the boot**





# From strategy to structure



Structure

Asset allocation

Funds

Share portfolio

# Teamwork makes the engine run



# The portfolio manager



not steering, but keeping  
the wheels on

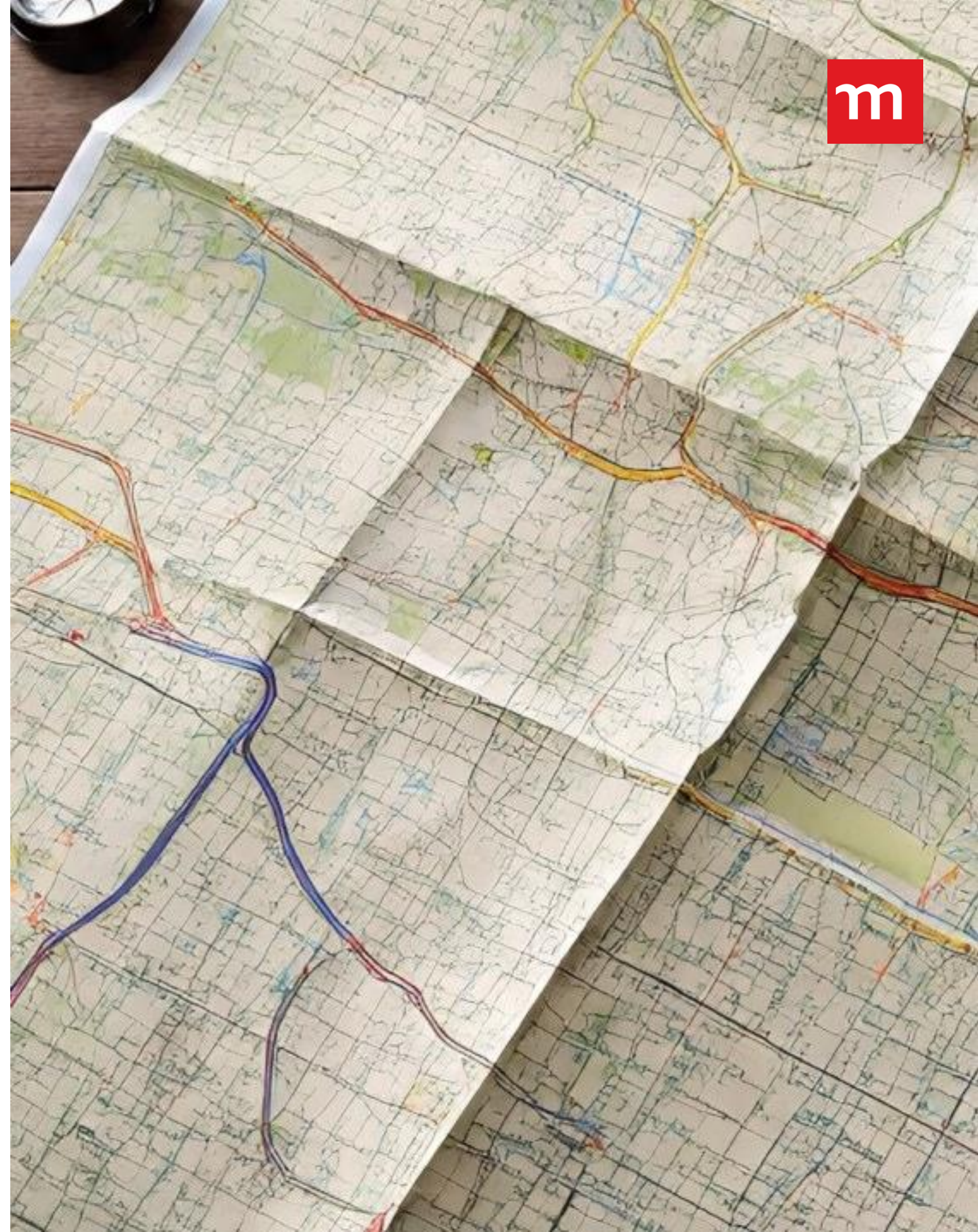


# Types of mandates

Execution  
only/self

Discretionary/  
managed

Advisory/  
bespoke





Shares

Fiduciary  
deposits

Offshore

ETFs

Bonds

Structured  
products

Adviser

Client

Portfolio  
manager

# Why it matters

Roles = Trust = Results

# FINISH LINE

**momentum**  
securities

