



BREWIN DOLPHIN



CARDIFF



FORWARD THINKING SINCE WAY BACK

We have nearly 250 years of heritage, earning a solid reputation of trust and stability whatever the financial climate.

In the fast moving and dynamic world of investment we are both progressive and proactive, with a current group turnover in excess of £200 million p.a.

INTRODUCTION

As one of the UK's largest independent private client investment managers, Brewin Dolphin has enjoyed a long-standing reputation in the financial sector and we have built a solid presence in South Wales.

Our Cardiff office consists of an experienced team of professionals, with City experience and local backgrounds, enabling us to offer investors the full breadth of our investment management services. Our services include discretionary/advisory portfolio management for private clients, trusts, charities and companies, management of self-invested personal pensions (SIPPs) and other types of pension as well as services for professional intermediaries.

We welcome new clients and look forward to working with you to tailor a bespoke strategy to help you achieve your financial goals.

INVESTMENT MANAGEMENT

In an increasingly complex market place, sound and timely investment management is the key to protecting the long term financial wellbeing of your family or your business. At Brewin Dolphin in Cardiff, our team of investment managers has the knowledge to deliver clear, expert guidance. As one of the largest independent private client investment managers in the UK, Brewin Dolphin is well placed to provide unbiased advice that is precisely tailored to your needs.

Our independence comes from not being owned or controlled by any other company. Our status in relation to advising on packaged products is 'whole of market'.

Investment Management

We can help you to structure an investment portfolio that best suits your needs, whether you are looking for income or to achieve long-term returns. Depending on the level of day-to-day involvement you would like to have in investment decision-making, you can choose from our discretionary and advisory services. In both cases, your investments can be checked online at any time.

Discretionary Management

This is our premier service and one suited to those of our clients who prefer that our specialists deal with all matters relating to investment selection, ongoing investment management and administration on their behalf thus relieving them of the burden of doing so. A detailed mandate is agreed with clients at inception and within this we're able to respond quickly as and when markets change without the need to refer to clients beforehand. We currently manage portfolios with a value in excess of £14bn on this basis.

Advisory Management

If you prefer to make your own investment decisions but want access to specialist advice on an ongoing basis you can take advantage of our Advisory Managed service. This enables you to be involved in all decisions affecting your investments but allows you to leave all aspects of the day to day administration of your portfolio to us.

The value of investments and any income from them can fall and you may get back less than you invested.



WE TAKE THE TIME TO LISTEN TO OUR CLIENTS,
ONLY OFFERING ADVICE WHEN WE HAVE A
CLEAR UNDERSTANDING OF YOUR SITUATION





OUR TEAM

The success of our Investment Management team is founded on the people who deliver it. We recognise that your circumstances and needs will change over time and the advice we provide should reflect this. When that happens, your team will be able to draw on the expertise of other specialists from around the company, ensuring that you have access to the products and services you need, where and when you need them.

Our ability to help clients create and preserve wealth was recognised when we won the **Best Discretionary Service Award** at the 2008 Daily Telegraph Awards and the title of **Best Discretionary Stockbroker 2009** awarded by Shares Magazine. Most recently, we won an award for the quality of our investment research at the **2010 Investment Week Fund Manager of the Year Awards**, in the Discretionary Investment Management Category and the **2010 Citywire Large Firm Adviser Choice Award**.

These awards recognise Brewin Dolphin as a leader in discretionary investment management services and demonstrate our ability to provide innovative and tailored solutions for our clients.

AN ENLIGHTENED APPROACH

Whatever the economic climate, it is important that your investments are working hard for you and in the most tax-efficient way. While predicting the exact turn of events is impossible, knowledge, preparation and adaptability in shifting markets, are essential.

At Brewin Dolphin in Cardiff we recognise the importance of these qualities. Our local team's breadth of knowledge and expertise allows us to navigate through the myriad of options available, and to deliver clear, impartial and individual advice tailored to your circumstances, needs and your attitude to risk.



YOUR QUESTIONS ANSWERED

Why should I trust Brewin Dolphin?

Established nearly 250 years ago, Brewin Dolphin is now one of the largest independent private client investment managers in the UK, with offices throughout the UK and Channel Islands. Here in Cardiff we can trace a long history going back to the Cardiff Stock Exchange and currently have an experienced team of 10 qualified investment specialists, a number of whom have been advising clients on their financial affairs for many years.

Who will look after my business at Brewin Dolphin?

Our goal is to offer a bespoke and personal service to our clients. Every client will have access to a team headed by a local Divisional Director.

How do I get the very best out of Brewin Dolphin?

Our qualified team starts by building a clear picture of your financial circumstances and objectives in order to design an investment strategy to meet them. Regular contact is maintained to inform you of progress and to ensure any change in your ambitions are taken into account.

Are you happy to work with my other professional advisors?

Absolutely. Managing your Brewin Dolphin portfolio in the wider context of your financial affairs is an essential part of helping you to achieve your aims and objectives.

Will I receive straightforward, jargon-free advice?

Yes. We are dedicated to creating investment solutions that are tailored to your needs at all times and these solutions are clearly explained and fully understood by you from the outset and throughout your time with us.

Where do I start?

There are many ways to contact us, but we believe the best basis for any new relationship is a face-to-face meeting so we can get to know each other. An informal meeting with one of our team, whether at your home or in our office, will help us understand your needs and together from there, we can plan and implement the best wealth management strategy for you.



Sutherland House, Castlebridge, Cowbridge Road East, Cardiff, CF11 9BB

T 029 2034 0100 **F** 029 2034 4999 **E** info@brewin.co.uk **W** brewin.co.uk/cardiff

Aberdeen	Leicester
Belfast	Lincoln
Birmingham	Llandudno
Bradford	London
Brighton	Lymington
Cardiff	Manchester
Cheltenham	Marlborough
Chester	Newcastle
Dorchester	Norwich
Dumfries	Nottingham
Dundee	Oxford
Edinburgh	Plymouth
Elgin	Reigate
Exeter	Shrewsbury
Glasgow	Stoke-on-Trent
Guernsey	Swansea
Hereford	Taunton
Inverness	Teesside
Jersey	Truro
Keswick	York
Leeds	