



Alpha Portfolio Management fact sheet



What is your corporate background?

Alpha Portfolio Management specialises in developing and managing bespoke investment solutions for financial advisers and their clients.

We work with clients and financial advisers on a national basis, ranging from private individuals, trusts and charities, to corporates and professional intermediaries.

Whilst Alpha was only established at the beginning of 2014, the team has been successfully supporting financial advisers and their clients for over 20 years.

Alpha Portfolio Management has seen strong growth since its launch, with assets under management of £130 million, as at 31st December 2015.

Alpha Portfolio Management is a trading name of RC Brown Investment Management PLC, established in 1990.

Why should I consider using your discretionary fund management service?

Alpha Portfolio Management specialises in providing a discretionary portfolio management service, working in partnership with financial advisers and their clients.

With the team having more than 20 years' experience in supporting financial advisers, we feel we offer a safe pair of hands.

We provide experienced investment management and ongoing support, available through an independent administration platform.

Our investment process is robust, consistent and reliable, with our team supported by access to the resources and expertise of leading global investment firms.

Alpha has been awarded Defaqto's top 5 star rating for its Model Portfolio Service and Bespoke Portfolio Service.

What is your approach to discretionary fund management?

We work closely with financial advisers and their clients to align expectations within a risk conscious investment framework.

We construct and manage client portfolios in line with specific investment requirements, taking a dynamic approach to investment management.

What investment solutions can you offer through the Nucleus platform?

Alpha offers a range of collective-only model portfolios on the platform. We look to develop an appropriate investment solution for financial advisers and their clients.

What are your fees?

Alpha is service focused. Charges for discretionary management are competitive, but will depend on specific investment requirements and ongoing service levels.

Management fees are subject to VAT.

Who should I contact to discuss the service further?

For more information on Alpha, please contact;

Andrew Morris, Head of Business Development:
Email: andrew.morris@alpha-pm.co.uk
Direct Dial: 0117 203 3464

James Gardner, Head of Propositions:
Email: james.gardner@alpha-pm.co.uk
Direct Dial: 0117 203 3465

Head Office:
Email: info@alpha-pm.co.uk
Office Tel: 0117 203 3460

Further information can be found on Alpha's website:
www.alpha-pm.co.uk