



## Tilney fact sheet



### What is your corporate background?

With a heritage of more than 180 years, Tilney Asset Management is a successful, well established investment manager, managing over £20bn of asset for private individuals, charities and personal and occupational pension schemes. Recently acquired Ingenious Asset Management and Towry.

### Why should I consider using your discretionary fund management service?

Tilney Asset Management believes that clients are not risk averse, they are loss averse. We combine institutional skills that focus on understanding the potential for loss with the high client service standards expected from a boutique firm - two skills that rarely reside in one organisation.

Over 50% of our staff are invested in our business, aligning our client's interests with our own.

We embrace innovation and have a demonstrable track record of delivering strong risk-adjusted returns to our clients.

A summary of key benefits:

- Unique fund selection that highlights excellent fund managers
- An investment process that focuses on downside protection
- Adviser retains day to day client relationship
- Direct lines of communication to the investment managers
- Consistency of investment proposition
- Reduce administration when using Model Portfolios
- Regular portfolio updates including TER, performance and asset allocation information

### What is your approach to discretionary fund management?

Central to our investment philosophy is our belief that clients are particularly sensitive to losses rather than necessarily being averse to taking risks. This leads us to define each client's risk budget as the probability of loss over various time periods and the potential magnitude of that loss should it occur.

We also believe investing in funds managed by external managers provides the best risk adjusted returns for our clients.

Our investment philosophy has been developed by adhering to the following principles.

- To focus on achieving returns ahead of cash and to increase the real wealth of our clients
- Asset allocation is the primary determinant of long term investment returns

- To understand and manage investment risk, particularly the risk of loss of capital
- To appraise and where appropriate adopt and develop new investment techniques
- To back our judgment and invest our own money alongside our clients

### What investment solutions can you offer through the Nucleus platform?

- Tilney Model Portfolios: 5 risk rated models + 1 income model focusing on real income and growth
- White labelled Model Portfolio service: fully integrated with advisers offering and risk profiler

### What are your fees?

- Tilney Model Portfolios - 0.33% + VAT
- Premium Model portfolio service, price on application

### Who should I contact to discuss the service further?

Michael Hanlon  
London  
E: michael.hanlon@tilney.co.uk  
t: 0203 818 6919

Mark Doidge  
London and South  
E: mark.doidge@tilney.co.uk  
t: 0203 818 6915

Mark Coles  
Essex  
E: mark.coles@tilneyforintermediaries.co.uk  
t: 0121 227 6320

Simon Brennan  
Scotland  
E: simon.brennan@tilney.co.uk  
t: 01412129314

John Alexander  
North  
E: john.alexander@tilneyforintermediaries.co.uk  
t: 07866 125166