

Wellian Investment Solutions fact sheet

What is your corporate background?

The team at Wellian Investment Solutions have provided independent fund research to the IFA community for over 10 years, this was extended to offer discretionary fund management services in 2007.

With a team of fund managers that have a diversity of skills, knowledge and experience, we have the resources in-house to make instant investment decisions to reinforce your client portfolios.

Why should I consider using your Discretionary Fund Management service?

We work exclusively with IFA's who recognise their clients' needs for professional investment management in conjunction with the wider advice they are giving. We recognise and value the advisers' relationship with their clients and refrain from intruding upon it, it is for this reason that Wellian does not have an advisory arm. Advisers who work with us regularly will have access to our investment research and we can undertake research on funds, portfolios and products on their behalf.

What is your approach to discretionary fund management?

We apply a combination of a top down macroeconomic approach to asset allocation together with a bottom up approach to fund selection to create a portfolio that is designed to match the designated risk profile.

All the funds selected for the portfolios have been through a rigorous research process by the investment team before being approved for inclusion within the models.

What investment solutions can you offer through the Nucleus platform?

Through the Nucleus platform we offer our range of model portfolio's which are risk graded and income defined coupled with our specialist high income and ethical portfolio's.

What are your fees?

0.35% per annum + VAT Active Portfolios
0.25% per annum + VAT Passive Portfolios

Who should I contact to discuss the service further?

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