

---

## Our Investment Proposition

### A Personalised Approach to Financial Planning

- › The Prosser Knowles Investment Proposition provides low cost access to professional investment management. Our no-nonsense, easy to understand pricing structure ensures you won't pay extra hidden fees.
- › We will select a portfolio, constructed by a skilled investment team, that matches your objectives and attitude to risk.
- › Your portfolio will be created following a meticulous research process and will comprise high-quality diversified funds from major investment houses.
- › We monitor investments regularly to ensure your portfolio remains firmly within your chosen strategy.
- › Regularly, a skilled investment team will rebalance your portfolio so it is in tune with the latest market movements. If conditions change rapidly, they will make appropriate changes.

#### Investment Expertise

For peace of mind, the Prosser Knowles Investment Committee regularly monitors the performance of our chosen Investment Proposition to ensure that it continues to meet our clients' needs and requirements.

#### Professional Portfolio Management

With conditions in financial markets fluctuating on a daily basis, it is crucial that your investment portfolio is always structured correctly in order to achieve your objectives and reflect your attitude to risk.

Experience and expertise are needed to combine, for example, equities, bonds and cash – and then select the very best investment opportunities. Adapting a portfolio to reflect current market movements also requires detailed knowledge of the financial sector. Prosser Knowles' Investment Proposition offers the complete solution, managing mixed portfolios with the highest levels of financial expertise.

Wealthy families have been using dedicated professionals to successfully manage their portfolios for generations, but even if you don't have huge sums to invest, our Investment Proposition offers the enormous benefits of professional discretionary management at a highly attractive cost. Also, our clear and straightforward pricing structure means you won't be caught out by any hidden extras.

#### A Portfolio to perfectly match your objectives

Whether you are a cautious investor looking for steady long term growth or are more adventurous and happy to accept a greater level of risk, our Investment Proposition can meet your requirements.

A highly skilled team manages each investment strategy in line with the changing markets so your personal portfolio is working effectively to meet your specific financial goals.



By constantly assessing global economic and financial conditions, our chosen Investment Proposition's dedicated experts can evaluate the most attractive investment opportunities and the balance of assets.

Portfolios are then carefully created by combining high quality funds from some of the best known investment management firms in the world.

### Providing a straightforward solution

So if you are considering investing for the medium to long-term and don't want the everyday responsibility and hassle of personally managing your investments, our Investment Proposition provides a straightforward solution.

For further information about our service, contact a team member at Prosser Knowles Associates Limited.

---

*The Prosser Knowles Investment Proposition provides low cost access to professional investment management. Our no-nonsense, easy to understand pricing structure ensures you won't pay extra hidden fees.*

---



---

## Finding out more about Prosser Knowles Associates Ltd.

Please call us below or visit  
[www.prosserknowles.co.uk](http://www.prosserknowles.co.uk)

### Kidderminster



Unit 69, Hartlebury Trading Estate, Hartlebury  
Kidderminster Worcestershire DY10 4JB. T 01562 829 222

### Worcester



1 Castle Street, Worcester  
WR1 3AA. T 01905 619 100

### Cheltenham



Midway House, Staverton Technology Park, Herrick Way  
Staverton, Cheltenham GL51 6TQ. T 01242 506 962