tpo
the private office

Trusted
Experience
Objectivity
United
Results
Future

One trusted adviser to secure and increase your wealth

The Private Office is an award winning team of independent, chartered financial experts united by one vision: to provide a personal and bespoke wealth management service.

You have one trusted adviser to help with everything from major investment decisions to looking after your financial mail. We operate just as a traditional family office would; combining our skills and experience to offer an independent, service focused financial counsel.

One experience for your finances

The Private Office is led by a team of expert financial advisers brought together by the ethos that our work should be driven by your needs.

We have combined our experience and worked together as a team for more than a decade, and we have a personal relationship with every client: each one receives the special attention of one adviser and the combined knowledge and experience of us all.

Our approach has been proven time and again. That's why people have trusted us with their finances – many for more than 20 years.


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Total objectivity founded on informed analysis

Our clients value our commitment to providing bespoke solutions to meet their financial goals. Rigorous research, a hunger to understand the markets better than anyone else, and a pledge to find the best solutions for your financial needs, inform every recommendation we make.

We manage your finances through a tightly-controlled system of proven processes. This is delivered with an extensive support team of paraplanners, researchers and administrators who scrutinise, review, and act on a constant flow of financial information. Discretion is implicit in everything we do.

The system ensures that investments are monitored on your behalf and changes recommended when needed.

Knowledge

We know where to find the best investment ideas and solutions. It’s no coincidence that people come to us with exclusive and exciting opportunities.

A diverse team united to assure financial continuity

The Private Office provides the optimum balance of specialist and general financial consultation expertise. Our collective experience is vast: accumulating 250 years in UK and overseas high street banks, insurance companies, investment banks and stockbrokers.

Some planners have honed their tax planning and investment portfolio management expertise over three decades; others have specialised for years in personal injury cases or family wealth. Each has the support of a team of technicians, administrators and a quality assurance adviser to ensure thoroughness and due diligence.

Weekly briefings bring us all together to review the markets, sound out new ideas and discuss proposals, building in checks and balances every step of the way.

Whilst investment values can go down as well as up, every investment opportunity is vetted for you by a specially formed in-house team, The Private Office Investment Committee.

This is our blueprint for delivering consistent service in everything we do – from answering your phone call to translating the most complex financial information.

Each team member at The Private Office plays a part in managing every portfolio. This not only ensures continuity of service, it secures you the knowledge, experience and understanding of the whole team.

We share passion and enthusiasm for our chosen work and a rare insight that the world of finance can be as creative as you are willing to make it. We have access to a wide range of investment ideas and solutions, from the conventional to the unique, and we vet them all to find the best suited to each client.


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Our approach
shaped by individual needs

We manage many portfolios valued in excess of £250,000. The needs of clients, whether they are successful entertainers, captains of industry or people who have suffered catastrophic injuries, are dictated by their unique personal circumstances. So our relationships with them are as individual as our personal friendships.

Some clients are financial professionals, others have never had to open a bank statement. Some call on us only to vet and ratify their latest investment choices, while others need us to handle the smallest detail – even down to the filing.

While we insist on meeting each client at least annually for financial review, some people like to see us monthly or more frequently.

We adapt our approach to your needs, working with you at your office, our office, your home or anywhere else that meets your expectations.

We act as financial translators when needed, helping to demystify the business at hand. We ensure that you don't have to deal with any unnecessary paperwork. Once we have the information we need, and your agreement to proceed, we will complete all documentation on your behalf.

Results add up to our reputation

We spend time getting to know our clients. Only then will we take an informed view on the most appropriate allocation of assets across investment solutions: from property to equities and bonds, and from commodities to managed futures. Taking this time to agree what your portfolio should look like enables us to pinpoint the optimum individual investments.

Our approach has won over the most tentative of clients. Some have tested us with a small part of their portfolio and subsequently entrusted us with their entire finances. Our results have impressed them. That's why many of the professionals who recommend us to their clients choose us as their personal financial advisers. That's also why our own team members say they would entrust their family's finances to us.

Four unbreakable golden rules guide us:

- We fully investigate financial security and counter-party risks
- We ensure consistency in risk-adjusted returns
- We evaluate cost and tax when assessing value for money
- We only work with companies which put the client first

And six core principles shape our strategies:

- To maximise cash returns
- To manage risk
- To allocate assets strategically
- To minimise costs
- To improve diversity and have due regard for investment criteria
- To rebalance investments regularly and explain the full implications of every recommendation

Once a portfolio is live, we ensure that the investments' performance is monitored, scrutinised and administered on behalf of clients, who are updated fully at each review meeting.

The value of your investments can go down as well as up, so you could get back less than you invested.

Looking to the future with creativity and clarity

The Private Office objective is to find ever-better ways to protect and grow our clients' wealth, ensuring that life's financial storms don't blow them away. The services we deliver to get there may look familiar, the thinking behind them, and the solutions we find are anything but. Our services include, but are not limited to:

- Personal financial planning
- Long-term care planning
- Corporate financial planning
- Charity investment management
- UK and specialist pension planning
- Investment portfolio management
- Alternative and esoteric investments
- Tax estate and inheritance tax (IHT) planning
- Clinical negligence/catastrophic personal injury planning
- Legacy and succession planning
- Structural financial planning
- Expert/professional witness cases
- Entrepreneurial planning

Trust

The Private Office sets out to be completely transparent and open about fees and costs. Payment structures across the industry can be obscured in technical detail. We translate that detail, making sure you know exactly what your investments and our advice will cost.

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Chartered
Financial
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