

Direct Investment Portfolios

Whether you are a first time investor, an experienced investor or are just looking for a range of funds to invest in for the future, our investment portfolios have been put together to provide a ready-made, diverse selection of funds, all available within a single application.

Why choose one of our portfolios?

REDUCED CHARGES - we have removed the initial 5% charge usually applicable so that our portfolios suffer no initial charge and therefore offer good value.

EXPERIENCE - with over 20 years of experience Barnett Waddingham has carefully constructed these portfolios to offer easy access to a wide range of diverse funds.

PROFESSIONAL FUND CHOICE - with so many funds out there to choose from it's hard to know which ones to select. Our ready-made portfolios are designed to offer easy access to a range of funds managed by some of the world's best recognised managers.

DIVERSIFICATION - each of the four portfolios is invested in a wide range of asset classes with the aim of minimizing over-exposure to any particular area.

What are the portfolios?

CAUTIOUS - This portfolio offers a cautious approach towards investment. Over 50% of the portfolio is invested in fixed interest and total return funds with the aim of promoting stability during times of increased market volatility.

BALANCED - This portfolio aims to provide a balanced and diversified portfolio investing across a broad range of investment styles and a number of geographical areas, with the long term aim of producing capital growth.

ADVENTUROUS - This portfolio is designed for investors who have an aggressive attitude towards investment risk, with the emphasis on capital growth rather than capital preservation. This makes it suitable for investors who don't mind taking the risk of a downturn or enduring losses in order to seek the potential of higher returns in the long term.



INCOME - This portfolio is designed for those who want a regular income from their investments. By investing in bonds and equities, it has the potential to achieve both a competitive level of income together with capital growth. This is achieved through the use of funds invested in cash, government and corporate bonds and shares in companies paying high levels of dividends.

For further information

If you would like further information, please contact Lei Li on 01494 788100 or email bwidealing.group@barnett-waddingham.co.uk.

Barnett Waddingham

Private Clients

Barnett Waddingham - FEBRUARY 2010

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