

**It's your future.**  
We've been  
planning for it.

**Parmenion and you.**

The investment solutions and support  
that drive successful businesses.

# Your business. Accelerated.

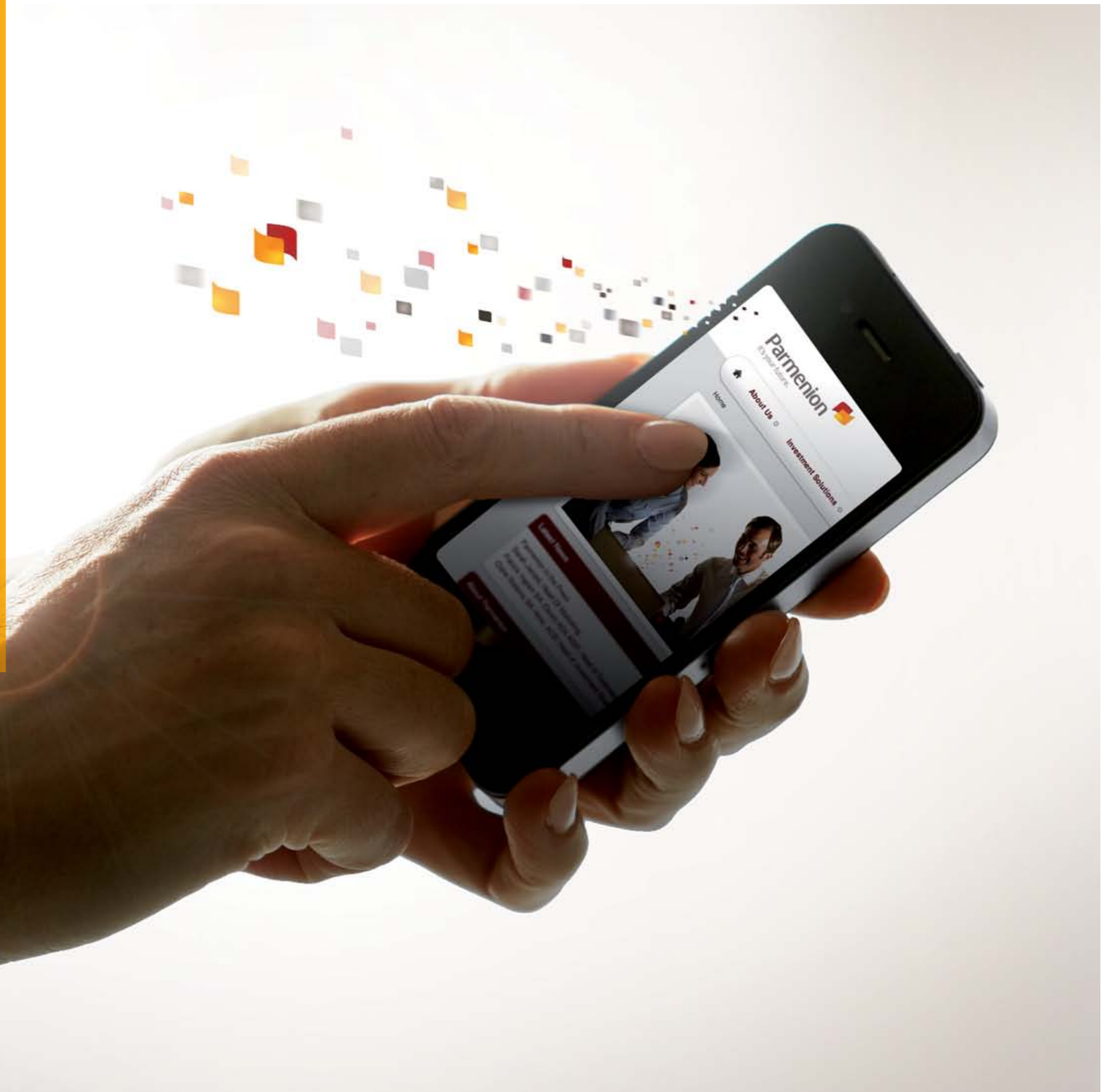
Parmenion is committed to helping Financial Advisers thrive in today's competitive and challenging environment. By providing a complete investment process that plugs seamlessly into your business, we provide you with the tools you need to offer the best possible investment service to your clients.

With our award-winning Adviser support, we provide assistance at every stage of the advice process from risk profiling and investment selection through to ongoing reporting, meaning that you can concentrate on building a more efficient, scalable and profitable business.

Our investment solutions, which comprise a range of investment styles and are mapped precisely across a spectrum of risk grades, are supported by some of the top investment managers in the industry.

Independent and privately owned, we're backed by experienced investment and technology experts. We don't take on clients directly, but instead work with you to deliver the investment solutions your clients demand.

In a world of uncertainty, we put you in control – helping you build your business, your brand, and your profits. After all, it's your future.



# Our role: to help you take your business to the next level.

You know what it takes to run a business. But finding the time to service clients and build your business, whilst selecting and overseeing investment portfolios, can be extremely challenging in this competitive and regulated world.

At Parmenion, we're passionate about investing and making the lives of Financial Advisers easier.

Our service to you combines institutional quality discretionary management capabilities with award-winning adviser support, enabling you to deliver a sophisticated investment service to your clients whilst building a successful business.



“FROM MINOR DETAIL CHANGES TO MAJOR INVESTMENTS, PARMENION'S TEAM HELP PROVIDE THE ADDED PERSONAL TOUCH THAT MY CLIENTS HAVE COME TO KNOW AND LOVE.”

MARC DENTON  
THE FINANCIAL GARDENER

And because it's your brand that matters, we offer an outstanding business proposition which is designed to help you build and enhance your brand – not ours.

## We support your business in 5 ways:



We provide a complete range of investment solutions that will plug seamlessly into your business. Driven by simple and consistent processes, our solutions comprise active, passive, strategic, tactical and ethical investment styles, each tailored across the full spectrum of client risk requirements and each delivered under your control.

Our range of solutions is provided by investment institutions from the highest levels in the industry based on solid investment principles and supported by consistent risk profiling.



We don't just offer investment solutions; we fully support you at every step of the advice process by providing slick administration, a range of advice tools including our risk profiler, state of the art technology, service guidance and marketing and compliance support – everything you need to build a profitable business.



It's your business and we understand that nothing's more important than your brand. That's why we provide the ideal environment for you to build a strong business, by offering an invaluable suite of client-facing, adviser-branded marketing material and website.



We recognise the importance of having a defined investment proposition embedded into your business, and with RDR around the corner we can help you to future proof your business by taking away the ongoing investment management, administration and investment compliance responsibilities - today and tomorrow.



Every portfolio under our administration is meticulously investigated, assessed and supervised by the Investment Oversight Committee (IOC), which comprises key members of our team. The committee will provide you with regular reviews and updates, so that you and your clients can be confident in your recommended investment strategy.



# Our investment solutions.

We offer an unrivalled range of flexible investment solutions:

## **'Plug in' investments**

Our investment solutions are created through the expert use of risk management tools to optimise portfolio construction and can easily be embedded directly into your business.

## **A comprehensive choice**

By providing access to an extensive range of discretionary managed solutions – both constructed and maintained by leading investment management firms and our own in-house team: Parmenion Fund Research – we enable you to offer your clients a wide and varied range of investments. Whether active, passive, thematic, strategic, tactical or ethical, the investment style options and risk permutations are almost limitless.

Our investment solutions are designed for quick and efficient implementation within financial advice businesses and are easily adaptable to a client's needs and expectations. All are fully supported by appropriate administration, technology and documentation.

Accessible through multiple wraps including ISAs, Offshore Bonds and SIPPs from major providers, all our solutions are governed under a single Parmenion discretionary mandate, enabling ongoing investment management to be undertaken with ease and efficiency.

## **Keeping you in control**

We cannot do this without you – you are the architect, guiding and shaping the investment strategy to meet your clients' needs, while we provide the back-end investment management and technology solution. You still maintain full control over your clients' assets.

The range of investment portfolios can be blended to suit the needs of your clients. So, models can be mixed within a single portfolio, and all or part of a client's portfolio can be managed actively or passively.

In addition, a complete investment valuation and reporting service is available online 24/7, with periodic valuations and annual tax reporting.

## **Efficient and scrutinised**

All of our investment solutions are governed under a single discretionary mandate, enabling ultra efficient portfolio management. This includes the governance of the solutions through our Investment Oversight Committee: the IOC (you can learn more about this on page 9), which provides Advisers with an initial validation analysis of the investment solution and governs ongoing monitoring.

Put simply, we have one main focus: adding value to your business. By working together with us, you can develop your client base profitability as well as your brand... safe in the knowledge that you have the full support of a company that's going places.

## **A fully supported investment process**

We provide a suite of investment management tools to support the investment process, which enables you to concentrate on managing your clients' needs. These include:

- » Assessing client suitability – our intuitive Risk Profiler (which has been independently reviewed by international business psychology consultants Edgcombe Consulting) helps you to determine your clients' attitude to risk and agree their risk mandate.
- » Investment selection – from a wide range of Investment Managers, you can select the preferred investment strategy for your clients.
- » Online risk mapping and asset allocation – we provide a range of risk adjusted investment solutions and recommend the optimal asset allocation to meet the investment strategy you have selected for your client.
- » Product recommendation – we will provide you with a client facing Investment Management Report to support the proposed asset allocation you have agreed with your clients.
- » Online application – through our smart technology, you can submit the application online, and produce a suitability report for your client.
- » And on an ongoing basis, we provide; online valuations, weekly commission reports, annual tax statements and automatic rebalancing of your clients' portfolios.

“  
QUICK, EFFICIENT AND  
A SPLENDID SERVICE IS  
ALWAYS GUARANTEED AT  
PARMENION. THEY ARE  
DEFINITELY THE BEST  
COMPANY I HAVE DEALT  
WITH AND COMPLEMENT  
MY BUSINESS IN A  
MASSIVE WAY.”

PAUL ROSS  
LANDMARK GROUP

# The benefits.

## To advisers

Our solutions, support, technology and expertise empower you to:

- » Embed a manageable investment strategy for every client into your business
- » Take control over investment strategies and costs
- » Spend more quality time and focus on the bigger picture with clients
- » Reduce administration and safeguard your compliance position
- » Focus on maximising revenues and streamline your business
- » Work with a truly independent partner
- » Put your brand at the forefront of your communications

## To your clients

Amongst the many benefits you can offer your clients are:

- » Dedicated discretionary investment management
- » Improved portfolio management efficiency
- » Significantly reduced paperwork
- » A straightforward, more visible investment strategy
- » A clear and transparent view of fees and charges
- » 24/7 access to their portfolios
- » Confidence that their attitude to risk is reflected in their investment strategy



# Robust monitoring.

## The Investment Oversight Committee

We understand that it's vital you have total confidence in the managers appointed to run your investment solutions. After all, they reflect directly on you in the eyes of your clients.

That's why every portfolio under our administration is subject to the supervision of our Investment Oversight Committee (IOC).

The IOC scrutinises all discretionary solutions available through us, including those provided by Parmenion Fund Research (PFR). It's the foundation of our service, with overall responsibility for the delivery and ongoing management of every investment solution.

This means it's charged with validating new discretionary managed model portfolios, appointing new investment managers, creating bespoke services for adviser firms, reviewing risk profiles and asset allocation structures, and final approval of investment solutions supplied under our custodial and administrative services.

With our commitment to responsibility and diligence, you can be certain that you're offering your clients the most reliable investment solutions available.



# Your business. Your brand.

The most successful businesses know the importance of establishing a strong and credible brand that clients come to know and trust.

This is never more important than when it comes to financial advisory firms that are dealing with clients' wealth.

That's why we provide you with a free suite of fully branded marketing material and website. Not only does this allow you to brand all the services you offer as your own, it helps you offer your clients consistent, reliable and reassuring solutions.

## The future's exciting

Parmenion is dedicated to your success, your future. If you'd like more information right now, please call us on 0845 519 0100 or mail@parmenion.co.uk

Parmenion also offers a series of factsheets detailing our investment solutions. These can be downloaded from our website.



# Testimonials

## Greg Little, Director, TNW Financial Services Limited

"Many thanks and also thanks once again for all your assistance over the past couple of years, it has certainly helped us streamline our business and it has been a pleasure doing business with likeminded people who actually provide a decent service".

## Paul Ross, Landmark Group

"Quick, efficient and a splendid service is always guaranteed at Parmenion. They are definitely the best company I have dealt with and compliment my business in a massive way."

## Tony Slimmings, WR Financial

"Parmenion are an IFA friendly firm with an excellent RDR investment proposition provided by very knowledgeable and helpful people. I have reviewed many investment propositions in my 20 years as an IFA and as a Chartered Financial Planner and I can honestly say Parmenion offer one of the best I have ever seen or used."

## Terry Little, Thompson & Richardson

"My only disappointment was our connection with Parmenion came late in my career. I have found your company excellent in its proposition and a pleasure to deal with."

## Bryn Brothers, IFAC Limited

"A competitive charging structure allied to a first class advisory service makes the Parmenion Discretionary Fund attractive to both clients and IFAs."

## John Scully, Index

"The service is excellent"

## Rhian Watson, Caleb Roberts

"Excellent service - we're always kept updated with a new application and the website is one of the easiest to use."

## Kevin Mullins, Landmark IFA

"Partnering with Parmenion gives us some significant advantages over the traditional platforms. This is the ideal support for financial planners and their clients; it frees our time for financial planning and gives our clients access to ongoing professional investment management."

## James Cree, K2 Financial Services

"Parmenion have a first class service. We love the ease and simplicity of the whole application procedure and prompt acknowledgement of applications. This gives the client an excellent impression of K2 and Parmenion and confidence that their investment is managed specifically for them. We are so impressed that we use Parmenion for our own investments. All in all: simplicity, TCF and excellent service."

## Andrew Dyson Dip PFS, T&R

"Since we partnered with Parmenion nearly two years ago, we have been confident that we have a robust investment advice process that stands scrutiny from many aspects: the client, the regulator, TCF, competitors et al. The simplicity of dealing with Parmenion is a key factor in our success."



For more information  
please call us on  
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# Parmenion



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