

VICTORIA

Victoria Private Investment Office

— CHICHESTER —





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Wealth Management

We offer a bespoke independent wealth management service to private clients, charities, and trusts – a service built on over 22 years of institutional and private client experience that places investment performance and client service at the heart of everything we do.

Our aim is to make life easier for all our clients - to demonstrate to every client every day that their wealth is being well looked after and we are managing our clients' wealth as we would manage our own.

Whether you have an existing investment portfolio, cash savings, a self-invested pension plan or ISA, we offer global investment expertise working to help our clients achieve their goals and ambitions.

Probate

We offer a full-service probate service to estates – typically instructed by solicitors, our probate discovery, valuation, and stock-broking services are fast, cost-effective, local and in-person – cutting the workload for solicitors and private clients.

Unlike many national wealth managers who often consider probate a distraction, probate is at the heart of our business. We welcome client estates of all sizes.

Who we are

Victoria Private Investment Office has been managing investments for more than 15 years.

Originally founded to look after the investments of the Scanlon family who owned Foster's Brewing Company in Australia, we have grown through word of mouth.

We cherish our independence, and being free of conflicts of interest is crucial for safeguarding client interests.

How we are different

You are looked after by your personal investment manager who manages your tailor-made portfolios. Your relationship is not managed by a relationship manager who is frustratingly not involved in the day-to-day investment process.

We value personal relationships and the importance of service and earning family trust. Every client is treated equally regardless of the size of your investment portfolios. Many larger wealth managers and international private banks do not do this.



We have a service culture — not a sales culture.

We bring an institutional approach to investment research, asset allocation and investment selection.

Our investment philosophy focuses on maximising absolute portfolio performance through the investment cycle – we aim to be pro-active in anticipating cyclical changes in the global economy and in the wider market sentiment but believe high quality growth companies will grow through each cycle.

Whether we are investing directly in stocks and shares or through collectives like investment trusts or unit trusts, we have built our reputation on a rigorous, consistently repeatable, independent investment process. It is a process that identifies the fundamental strengths of the companies and external investment teams we look to invest in and highlights the weaknesses of those we actively seek to avoid on your behalf.

We look to invest for the long-term – often, the right decision today is still the right decision in 5- or 10-years' time as the earnings power of the underlying business comes through.

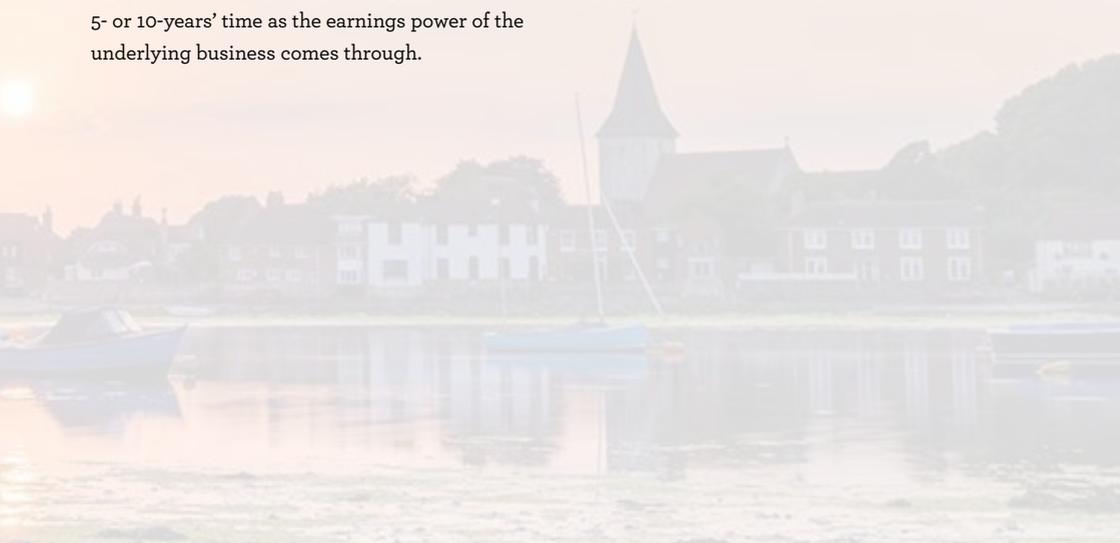
Your decision

Most clients have a decision to make — do I look after my portfolio myself or delegate it to someone I trust?

For some, investment management is a fascinating pastime, and they may succeed because they have a lot of prior experience of investing allied to good sources of information, natural flair, and the motivation to commit the time.

Most people do not have the knowledge, experience, or time to do it themselves and therefore choose to appoint someone they trust who offers the necessary experience and expertise. Someone who understands your family and financial situation and works to build a lasting relationship. Someone who understands how much work went into building your wealth in the first place and how important it is to protect and grow its real value for you and the for the benefit of future generations.

We are very happy to sit down and answer all your questions for as long as you like.



Key People

Tom Helme FCSI

Tom has managed and advised on investment portfolios for private clients, charities, institutions and trusts for over 20 years.

A graduate of Bristol University, Tom was previously an analyst and investment manager at Baillie Gifford & Co. in Edinburgh, Investec Wealth in London and, for the last 4 years, head of office for Rowan Dartington & Co. in Chichester, West Sussex.

He returns to West Sussex with a young family and lives in the South Downs. When not working, he divides his time between the Czech Republic and a farm in Cumberland. Tom enjoys cricket and skiing.



Phillip Russell

Phillip is the co-founder and major shareholder of Victoria Private Investment Office with Inno van den Berg.

He has over 35 years of experience in investment and risk management, including specialist expertise in currencies, in Tokyo, Hong Kong and London. As well as advising clients and managing portfolios, he is the CEO, responsible for the day-to-day management of the firm.

Phillip has a degree in languages and modern European studies from Liverpool University, and is a Chartered Member of the Chartered Institute for Securities & Investment (CISI).

Inno van den Berg

Inno is the co-founder and major shareholder of Victoria Private Investment Office with Phillip Russell.

He has over 30 years of experience managing portfolios as well as sales and trading teams in New York and London. He also sits on corporate boards as a non-executive director and is a trustee for a number of charities.

Inno has acted as an expert witness and speaks frequently on investment risks and disputes relevant to charities and trustees. He is a Chartered Fellow of the Chartered Institute for Securities and Investment, a Chartered Wealth Manager, a member of the Expert Witness Institute, and a member of the Academy of Expert Witnesses.

Keeping you informed

Nominee Account

Client assets are held separately in nominee accounts with custodians through AJ Bell.

Protection

You are protected by the Financial Services Compensation Scheme (FSCS) — an independent body established by the Financial Services and Markets Act 2000. Full details are available on request.

We also have specialist insurance cover in place to protect us and our clients from loss to any of our clients' assets.

Valuations & Reports

We will send you regular valuation reports and an annual consolidated tax certificate as standard and you may request additional valuation reports as often as you wish.

Online access to see your current portfolio is also available anytime.

Charges

Please see our rate cards for full details of our fees and dealing commission by service.

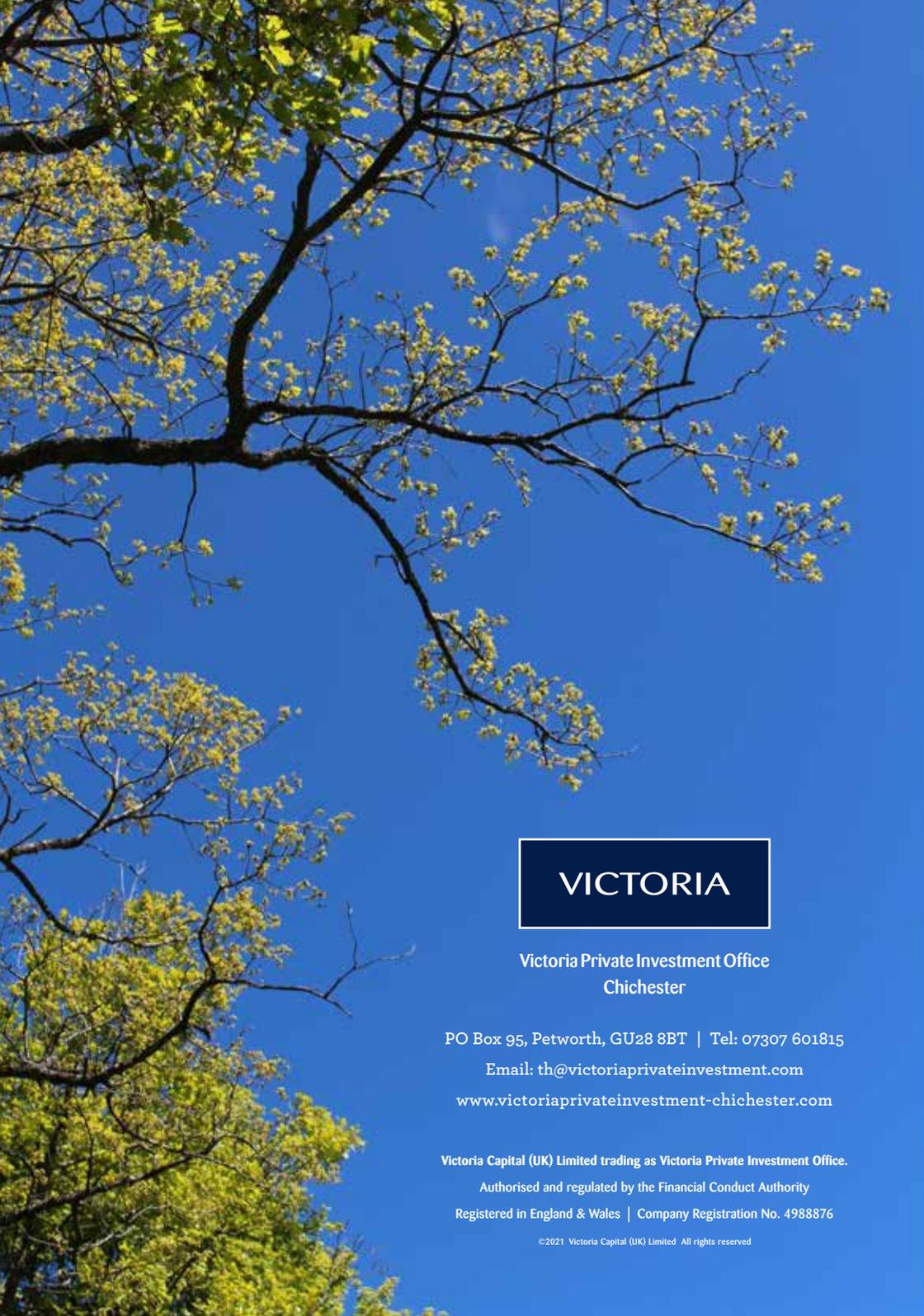
Contact us

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