



INDIVIDUAL INVESTMENT MANAGEMENT
& PRIVATE BANKING SERVICES

A MESSAGE FROM OUR CHIEF EXECUTIVE OFFICER

A warm welcome and thank you for taking the time to visit us.

This website has been written entirely by my team and me - the very same people who deal every day with our clients and their professional advisers - any errors or omissions are therefore ours. Moreover though, we hope that our own amateur words are the best way of conveying the DNA of our business and inviting you to find out more.

Many of our clients have made their family's wealth in their own generation; whether an entrepreneur, professional, sports person or creative - they quite literally invested themselves into pursuing their dreams and talents. Many can point to the costs of success as well as the exceptional fulfilment and financial reward it can also bring. Many of them have also met financial services people...often bright eyed and bushy tailed but with limited life or business experience.

It strikes me that just because the world gets wealthier doesn't mean that there is a ready supply of high quality bankers to serve their needs - how can any industry grow its headcount exponentially without sacrificing quality and training for the pursuit of getting people on the streets selling solutions. Even in my own career of nearly 20 years, I have seen a terrifying shift from personal bank manager and trusted family investment manager to remote call centres and 2 week training courses for new recruits.

Money will never be as important as health or able to confer happiness but it does deserve to be taken extremely seriously by trained, experienced money managers whose first objective is the clients wealth; not their own. We hope that you will get to know our team and see for yourself the singular focus we place on our clients wealth

Like most people who alter the passage of their life, I founded this business for a complex group of reasons; some of which I know and some of which even years later I can't quite fathom. Most of the normal spurs were there; prove I can do it, make use of my education, delve deeper into a profession that I love.

However, above all, it was very clear to me that if I was to offer my clients an extra layer of appreciation and understanding of their worlds such that we could create a better chance of success, I had to leave my comfortable existence and take some of the risks they did. Living vicariously is never the same as being there yourself.

So, along with my incredible founding team, houses and cars were sold, credit cards swiped, regulators approached and wives and partners cajoled that starting an investment business from scratch in an industry dominated by the largest institutions in the world was actually a really good idea.



So, nearly 5 years on and for all the mistakes we have made and the best efforts of the global economy to implode, we're still here; stronger than ever, profitable, never having lost a client and as I write this on a long haul flight in late 2008, this business, the people who work in it with me and the clients we serve make every sacrifice worthwhile. Maybe, just maybe our team can now claim to truly understand the exceptional people who pay our wages - our clients.

Simon Davies
Chief Executive Officer