



INTELLIGENTMONEY



## About Intelligent Money

Established in 2002, we continue to set the benchmark in developing the UK's highest quality, best value investment propositions. We do not accept clients directly, only through advisers. We respect the value of advice and the adviser/client relationship and have been entrusted with over £1bn from advisers on behalf of a range of clients – from the very wealthy to those just starting out investing.

Our investment proposition is unique. Risk is managed internally based upon the age, investment horizon and end requirement of each individual client. Asset allocation is established, regularly reviewed and updated based upon these primary factors.

The selection and management of the underlying investments (mandated to Quilter Cheviot) runs in conjunction with this. Our approach creates a 3-dimensional investment management logic for each of your clients.

We also operate on 3 basic principles when it comes to administration and service levels; we do what we say we will do, we do it correctly and we do it on time. We believe this is why we have become the UK's largest intermediary-only SIPP & Investment Provider without once advertising.

We also believe in using technology to keep things simple. You can find out more about us by looking through our website. Alternatively, just pick up the phone and speak with us.

THIS INFORMATION IS INTENDED SOLELY FOR PROFESSIONAL FINANCIAL ADVISERS AND ACCOUNTANTS.  
IT SHOULD NOT BE RELIED UPON BY ANY OTHER PERSONS AND IS NOT A CONSUMER ADVERTISEMENT.