



INTELLIGENTMONEY

3-Dimensional Investing

Internal risk management within our target dated portfolios gives the optimum strategy for each investor at every stage

3-Dimensional Investment Management

Each of your client's goals, requirements and time frames are unique. We therefore ensure the management of their investment portfolio is too. Regardless of whether they are building wealth or drawing down an income from it, it is important that their investments are being managed in a way that always puts the preservation of capital first.

This is precisely what the IM Optimum Portfolios are designed to achieve.

We combine advanced technology with bespoke discretionary investment management to create 3-dimensional investment solutions.

This delivers target dated investment portfolios where risk is managed internally and rebalanced on an ongoing basis based upon the age, the time remaining available for accumulation, and end requirement for the funds - a lump sum for withdrawal or a lump sum to produce an ongoing income - for each individual client.