Henwood COURT

portfoliosense®
a more dependable way to invest

# Key benefits of Portfolio*sense*®

Portfolio*sense*® follows six rules of sensible investing:

- Invest on purpose
- Risk and return are related
- Be a long-term investor
- Retain a healthy cash reserve
- Track, don't pick
- Keep emotion in check

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It is becoming ever more complicated to manage your own portfolio with so much choice and contrary opinion on where to invest your money that has been hard earned. Few people have the time to research all the options and implement all the appropriate actions. So where do you start and who do you trust?

At Henwood Court we understand this...

The Portfolio*sense*® Service is a dedicated cost-effective investment only service, providing a structured and systematic approach to investing capital, designed to deliver proactive investment management and long-term outperformance all at a low cost.

With the Portfolio*sense*® Service you benefit directly from our expertise in investment management, state-of-the-art portfolio design and access to Portfolio*sense*®.

## Portfolio Advisory Service

Using our strategy known as Portfolio*sense*® you will receive professional advice to identify the right investment strategy for your needs. This proven, smarter, evidence-based approach to investing capital, designed to deliver proactive investment management and long-term outperformance all at a low cost using highly diversified portfolios created from the investment research of noble prize winners and leading academic research.

This includes behavioural finance support (stopping you making poor choices or expensive mistakes) and automated rebalancing and fund switching. With online tools allowing you to monitor your portfolio and obtain real time valuations with monies all held on a market leading online platform.

## Structured Reviews

A structured formal review of your portfolio every three years (annually subject to minimum fees) where we will reappraise your objectives and risk tolerance. More regular reviews are available subject to the fee appropriate at the time.

## Your Own Team

Your investments will be managed by a dedicated financial planner. Your team will be available to answer any ongoing investment queries that you may have or deal with the associated administration of managing your investment affairs.

## Access to your own personal Portal via the Henwood Court App

The Henwood Court App and portal provides a secure central document transfer, e-signature and filing system for all those important legal and financial documents. Transforming the management of your financial affairs, bringing organisation, simplification, information and communication all at the touch of a button – maximising the use of technology for your benefit.

## The Financial Information Service

We send you quarterly investment performance commentaries.

## Part of the Henwood Court Alliance

As a client of Henwood Court you will have access to our alliances of contacts that provide a wide range of services such as reviewing your energy suppliers#, executive coaching#, media training#, web-site creation#, marketing#, general insurance#, mortgages#, and much more. Many of these alliances provide costs savings to Henwood Court clients.

## Business*sense*®

You will receive access to the full suite of Business*sense*® content to include practical articles and webinars.

## Additional Chargeable Services

As a client of Henwood Court we can also provide access to a wide range of additional services subject to the fee appropriate at the time. You can benefit from many of these services as part of the Financial*sense*® package.

## Financial*sense*®

As a Henwood Court Portfolio*sense*® client you may wish to access the Financial*sense*® financial planning service and breadth of associated services. Financial*sense*® retain all the benefits of the Portfolio*sense*® model but to additionally benefit from comprehensive financial planning – this is the process of managing your wealth in accordance with the life you want to live. It ensures all your financial decisions and financial resources are focused on you achieving your life goals using sophisticated cash flow planning to help bring planning to life. It uses the Financial*sense*® Scorecard to audit your financial and legal position to identify any gaps in your planning.  For further information on the cost of this service please speak to your team.

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**Not all tax planning is regulated by the Financial Conduct Authority.**
**#These services are not regulated by the Financial Conduct Authority.**
**This information is current as at the date of writing (10/20) and may be subject to change.**