



MVAM

MOLE VALLEY
ASSET MANAGEMENT

BESPOKE INVESTMENT PORTFOLIO

WHO?

Mole Valley Asset Management offers innovative and bespoke investment services to private clients and intermediaries.

WHAT?

Bespoke portfolios are portfolios tailored to meet the individual needs of you, the client.

We build bespoke portfolios of securities based on your individual profile, your attitude to risk, your capacity for loss, your investment time horizon and your future needs for income and/or capital.

Portfolios can invest in shares, bonds, cash or precious metals but are built solely with your wishes and needs in mind. No animal testing, done. No fossil fuels, done. Only alcohol stocks, well we might have an additional discussion on that....



WHY?

Your own portfolio

Your investments are not part of a pooled investment vehicle, like a unit trust, but yours and yours alone. Your holdings and the size of those holdings in your portfolio will be different to all other clients. You are likely to hold very similar, if not the same holdings, as other clients of your portfolio manager, but they will not be identical.

Your own performance

A different portfolio will mean a different performance. Your portfolio will have its own performance which is likely to be different from all other clients. We have found that over the short term these differences can be quite large but over time tend to even out. Not always but generally.

RETAIN ACCESS

If you need your money back, no problem – we simply sell the shares and send you the money.

KEY BENEFITS

- Invest in good quality companies
- Consistent, repeatable strategy
- Clear reporting
- Money back usually within a week of receiving a redemption request

FAIR FEES

- No charge for advice
- No entry fees or exit fees
- Annual management charge of 1% FUM first £75,000, 0.75% FUM for remainder
- An annual performance fee of 15% of returns FUM (net of management fee) over 5% gain per year
- Dealing and admin fees will be charged

OUR PORTFOLIO FAMILY

- AIM Inheritance Tax Portfolio (IHT)
- Bespoke Investment Portfolios (BIPs)
- Fixed Income Portfolio (FIP)
- Make the World Better Portfolio (MTWB)
- Premium Dividend Portfolio (PDP)
- Rain or Shine Portfolio (RoSP)
- Yorkshire T20 Portfolio (YT20)

SAVING THROUGH

- Pensions
- Corporate Pension Schemes
- General Investments Accounts (GIA)
- ISAs

WARNING

The value of your investment in this portfolio and the income from it may go down as well as up, and you may not get back what you invested.

ABOUT US

Mole Valley Asset Management offers innovative and bespoke investment services to private clients and intermediaries.


A highly experienced team investing clients' savings directly into the markets aided by proprietary screening and original research.

A dedicated investor portal app.

Personalised reports issued monthly.

We always remember, 'It's your money'.

GET IN TOUCH TODAY

 01306 776999 / 01904 929430

 enquiries@mvam.com

 www.mvam.com



MOLE VALLEY ASSET MANAGEMENT

Dorking Branch

275 High Street
Dorking
Surrey
RH4 1RY

York Branch

Blake House,
18 Blake Street,
York,
YO1 8QG

Mole Valley Asset Management Ltd (MVAM), registered in England (Company no. 08600041) is authorised and regulated by the Financial Conduct Authority (registration no. 613008).