



# Build a Lasting Legacy with Cartwright Investment Advisers

## A different approach

Many charities receive off-the-shelf investment services which do not account for their unique and often specific financial circumstances. Indeed, all too often, this advice comes at a price that is significantly higher than best practice.

Ultimately this advice and its associated costs will have an impact on how long your assets will last.

This is where we at Cartwrights differ.

## A solution tailored to your needs

We specialise in working with small to medium sized trusts. By understanding your unique requirements, we are able to offer a bespoke, professional and high-quality investment service – the kind only large trusts have tended to enjoy up until now.

Specifically, we can help you with:

- Getting the balance right between spending and saving
- Picking investments that help not only your portfolio grow but preserve your assets
- We also look to align your portfolio with your values and beliefs, including (ESG)
- Our service means that we take care of administration headaches, such as transfers

## Why Cartwright?

- Founded in 1986
- Already work with over 100 trusts
- Independent and employee-owned

- Specialists in helping small to medium sized trusts
- Dedicated investment advice that provides strategies tailored to your specific needs

Being independently owned means we are free to give you truly unbiased advice and bring fresh ideas to the table.

Fresh ideas which are backed by experience; all our investment professionals are qualified, regulated and have over 15 years of experience in advising trusts like yours.

We understand the importance of delivering a flexible, high quality and cost-effective service and passionate about our long-term relationships – many go back decades, and our business is based around referrals from happy clients.

## Next steps

Creating a long-term strategy that's truly tailored to your objectives is a journey. We're here to guide you every step of the way. Long Term Partnerships are built around trust are the way we like to do business.

Your first step is to evaluate where you are now. And we can help with that too.

Email/Call Martin (contact details below) to discuss how we can help you meet your financial goals.

