

Case study: Becketts



BECKETTS

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Using Parmenion since:
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1. Why did you choose to partner with Parmenion?

Parmenion provided an investment partnership that was unique and perfectly suited the way we wanted to service our clients. Combining expertise but retaining a degree of control.

2. What does Affinity bring to your business?

The best of both worlds. An investment solution where we can influence investment decisions but one that has the oversight and protection of a national DFM.

“The ability to scale up whilst staying active in the investment solutions is unique.”

3. How does the Affinity partnership benefit your clients?

We believe strongly that the relationship between the client and adviser is key and that the ability for the adviser to understand and influence the underlying investment provides the client with added peace of mind and insight into how their investments are managed and positioned.

This in turn results in better and more informed decisions from well-educated clients. This leads to a more positive experience for the client.

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4. How has the Affinity partnership added value to your proposition?

Essentially as a firm grows it must focus its resources on what provides the best results for clients. This changes over time but the partnership allows a firm to leapfrog into the position of a much larger organisation.

We started with £5M under management but had the ability to manage the assets as if we held £200M. Now at close to £200M we have the ability to devote resources towards improving the knowledge and resources around the investment committee, therefore further improving the quality of the underlying investment solution. This ability to scale up whilst staying active in the investment solutions is unique.

Get in touch | To speak to one of the Parmenion team, you can call **0345 519 0100** or email mail@parmenion.co.uk