

02 July 2015

Vestra Wealth (Jersey) Limited extends Offshore MPS service

- *Offering extended to six offshore models*
- *Models available in Sterling, US Dollar and Euro*

Vestra Wealth LLP, when developing its proposition, quickly recognised a growing trend among independent financial advisers for a competitively priced and professionally managed outsourced discretionary solution using model portfolios. To meet this demand Vestra Wealth LLP launched five UK model portfolios in November 2009 with a sixth (income model) being added in 2010.

In 2014 Vestra Wealth (Jersey) Limited launched three “offshore” model portfolios, recognising the need to cater specifically for IFA’s operating in the international marketplace. This service has now been extended to the full offering of six models and is available in Sterling, US Dollar & Euro options. The “offshore” model portfolios are managed and custodied in Jersey but can also be custodied on external platforms. Each of these model portfolios operates within a published band of volatility with an asset allocation overlay and are not linked to any specific market benchmark.

But what makes these offshore models different when compared to the myriad of other model portfolio solutions out there in the marketplace? Portfolio Manager, Rohit Ahluwalia commented, “There are a number of distinctive qualities to the Vestra Wealth (Jersey) Limited model portfolios. Firstly, our approach is based on the premise that diversified portfolios implemented through high conviction investment ideas will provide our clients with superior risk-adjusted returns. Secondly, we are not constrained by any benchmark which means we can implement our conviction ideas through a flexible and dynamic process allocating to the most compelling investment opportunities. Thirdly, our portfolios operate within a band of volatility as opposed to any market benchmark, however we are cognisant of the market risk being taken”.

The composition of each portfolio is reviewed at least once a month with a re-balancing exercise of the underlying asset allocation and holdings occurring every quarter. The fact that they are discretionary model portfolios allows for them to be managed in such a way that there is no requirement for client permission or sign-off before any change can be undertaken.

The entry level for the Vestra Wealth (Jersey) Limited Offshore MPS is £50,000/\$50,000/€50,000 and the management fees are 0.25% with a further 0.25%

custody fee. For further details on the model portfolios please contact Stephen Rafferty Business Development Director Jersey on +44 1534 786413 or Tony Allan, Head of Business Development on +44 20 3207 8003.

Ends

About Vestra

Vestra Wealth (Jersey) Limited was set up to look after the assets of our offshore clients with the investment management and advisory activities conducted by Vestra Wealth LLP, our UK entity.

Vestra Wealth LLP was established with the clear aim of delivering truly unbiased wealth management services through a partnership structure. Their vision is to provide the levels of investment expertise normally only found in global firms, but in a personalised manner.

Investment managers have an average of over 20 years' experience in some of the world's leading firms and are committed to providing advice and investment performance with exceptional service.

- ▶ Vestra Wealth LLP trading since September 2008
- ▶ Vestra Wealth (Jersey) Limited incorporated in December 2008 and operating as a stand-alone office since November 2010
- ▶ £5.2bn assets under management as at 30 April 2015
- ▶ 26 Partners
- ▶ Over 180 staff
- ▶ Vestra's broad platform offers clients access to all aspects of wealth management.

Additional information on Vestra Wealth can be found at www.vestrawealth.com

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Vestra Wealth (Jersey) Limited is incorporated under the laws of Jersey. Registered office: Charles Bisson House, 30-32 New Street, St Helier, Jersey JE2 3TE. Registration number 102243.

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