



## Wealth Management Case Study

Being simple is not being stupid when it come to your investments.

We believe in less paperwork and less confusion over what you need to keep, file, bin or record. There are better ways to structure your portfolio to make it *'less administratively cumbersome'*.



Mr Hughes set up an investment portfolio 5 years ago that over the years had resulted in a lot of ongoing paperwork and confusing statements that he received, quite regularly, for his various investment holdings. He received a letter from the Hillier Hopkins Wealth Management Team asking Mr Hughes to consider a portfolio review. The investment world is constantly on the move and a portfolio that was set-up 5-6 yrs ago may not be the best structure for today. Mr Hughes was keen to find out whether his portfolio was still going to give him what he wanted.

### The Power of One: Simplification

The Wealth Management team undertook a process of 'Simplification' of Mr Hughes's portfolio. They dealt with all the paperwork and administration issues, so that the whole portfolio is now dealt with in *one* place. Mr Hughes is saving tax; gets *one* regular cheque from the whole portfolio; *one* 6 monthly statement of all tax, dividends, and income from the administrator (as well as quarterly investment reviews from Hillier Hopkins); plus, he can have web access to this information if he chooses to.



If you would like a fresh perspective on your financial position from genuinely independent professionals please contact Ben Sherwood on 01442 220713 or email [ben.sherwood@hllp.co.uk](mailto:ben.sherwood@hllp.co.uk)