TYNDALL

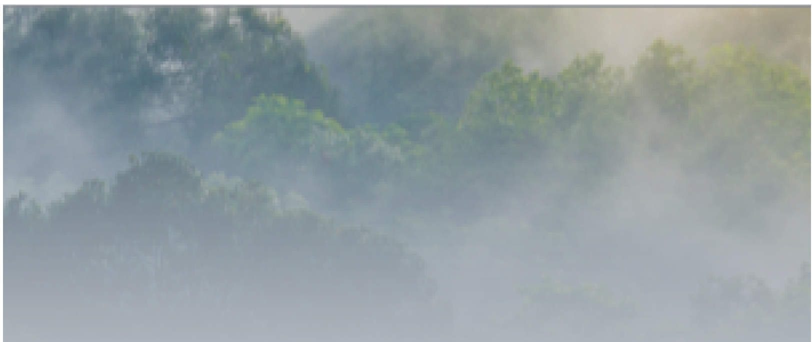
Private Clients

Investment management built around you

We believe a personalised approach leads to the best investment outcomes. At Tyndall Private Clients our first priority is to establish strong two-way relationships: to get to know your investment objectives and your long-term goals, and to provide you with full access to our investment expertise.

Our decisions are not subject to committee approval, so we are able to align and build an investment solution to meet your specific needs. We look for returns in new markets and growing sectors, guided by our collective experience and market analysis. Direct access to world-class independent research, so often hoarded by ivory-towered investment committees, sharpens our decision-making process.

Most important of all, your investment manager is personally accountable to you for the decisions that he or she makes on your behalf.



‘ Our decisions are not subject to committee approval, so we are able to align and build an investment solution to meet your specific needs ’

What we can do for you

Our first and most important question is ‘what is the money for?’. Understanding your long-term goals – and how they may change – is critical to our investment approach and consequently to achieving your investment objectives.

We use the full range of investment tools and account types to put your money to work within an efficient structure. In the UK, we invest for ISAs, SIPPs, and use Capital Gains Tax and Dividend tax allowances within personal portfolios (often called General Investment Accounts or GIAs) to keep tax-drag on returns to a minimum. For our worldwide clients, we look to local expertise.

Client assets are held in individual accounts at a leading institutional custodian bank. We direct the investments within these accounts, reporting to you as regularly as needs be, but at least quarterly, in addition to providing full online access.

Personalised investment management gives us the flexibility to incorporate your values and ethical exclusions into your portfolio, ensuring that your wealth is grown in a way that reflects your lifestyle and principles.

We give our managers the freedom to execute on their investment beliefs

‘ The fundamentals of investing will win out over the longer term ’

How we invest for you

Our objective is to conserve and grow your wealth over the long term above inflation. We look to benefit from volatile markets, understanding that greed and fear dominate market movements in the short term, often providing opportunity, whilst the fundamentals of investing will win out over the longer term.

When selecting investments, we look at their cash generation and underlying profitability, the quality of their management, their indebtedness, and most importantly, their long-term prospects for sustainable growth within the evolving world economy.

Areas of thematic growth form the bedrock of our investment philosophy. And as true active managers, we give our managers the freedom to execute on their investment beliefs with conviction.

‘ We actively look for growth in new markets and growing sectors, strictly refusing to use a model portfolio approach ’

A meticulous approach to portfolio management

No ordinary investment manager

We are a forward-looking, dynamic investment management company founded with a sole focus: to provide genuine high-conviction active management for our clients.

In an industry which is unrelenting in its drive towards benchmarking, standardisation, and mergers and acquisitions, we have made it our purpose to provide a differentiated investment experience for individuals, prioritising client outcomes over corporate convenience.

With Tyndall Private Clients, our highly experienced and skilled investment managers apply a meticulous approach to portfolio management. We actively look for growth in new markets and growing sectors, strictly refusing to use a model portfolio approach. We freely share themes, ideas, and market intelligence within the team, focusing on steadily conserving and growing your wealth within a personalised investment strategy.

As an independent, staff-owned boutique, we are invested alongside you. Your success is our success.

Working alongside you

Thorough personal service forms the foundation of how we work – the better we know you, the more attuned we can be to your investment needs.

How we work with you

Initial discussion

– Objectives and goals
– Financial circumstances

Fact find and risk discussion

– You fill in our fact find document
– Discussion of proposal, risk appetite vs objective

Account opening

– We pre-fill the paperwork using the fact find information
– Send/meet for signature

Asset transfer

– Transfer assets, either as cash or stock as agreed

Get in touch for a no-obligation conversation

Working with us

Achieve goals and incorporate your values

A personal investment strategy created to achieve your goals and incorporate your values, delivered by an experienced team of professionals

Owner-managed firm with a difference

Part of an owner-managed firm with a difference: putting you ahead of corporate convenience

Safe custody of your assets

Institutional safe custody of your assets and regular formal, informal, and online reporting to keep you updated

Transparency and accountability

Transparency and accountability through a direct relationship with the person managing your investments

Get in touch

If you'd like to find out more, please get in touch for a no-obligation conversation.

clientenquiries@tyndallim.co.uk

+44 (0)203 897 2302

tyndallim.co.uk/private-clients

Tyndall Investment Management
5-8 The Sanctuary
London SW1P 3JS

Capital at risk:
The value of investments can fall as well as rise and you may not get back the amount you have invested.

Named Winner of Emerging Manager and Finalists in the Investment Performance - Defensive Portfolios categories.

‘ From initial implementation to hitting your long-term goals, we’re committed to being your steadfast partner and flexing as your needs change along the way ’

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