

Investment Appraisal



ISACO
LET'S BUILD WEALTH TOGETHER.

Thank you for showing interest in a free investment appraisal. An investment appraisal is perfectly suited to UK citizens with Stocks and Shares ISAs and SIPPs. They provide the most value for investors with portfolios in excess of £100,000.

An investment appraisal is best suited to:

- UK Investors with ISA and SIPP assets valued in excess of £100,000.
- Investors with an adventurous appetite to risk who seek long-term capital growth.
- Business owners, wealthy retirees and professionals such as bankers, doctors, lawyers and dentists.
- Investors seeking strong long-term capital growth.

When booking a free investment appraisal, rest assured you are under no obligation to do anything, sign up for anything or buy anything and you will be treated with the upmost respect at all times.

Stage 1: Discovery – Your goals, values and preferences

Investment appraisals are carried out by telephone, and consist of two stages. The first stage is 'Discovery' and the second 'Strategy'. During stage one I will aim to uncover where you are now financially and where you are aiming to get to and during stage two, I will show you how to get there.

Stage 1 is called 'Discovery' which involves a comprehensive fact finding session. Getting to know you as an individual is essential to helping you achieve your financial objectives. We will listen carefully to you and devote significant time and energy to understanding your needs and goals.

We will look at all aspects of your financial situation, including your risk tolerance, return objectives liquidity needs, time horizon, current holdings, financial experience and other factors.

Stage 2: Strategy – Linking capital growth with financial goals and opportunities

ISACO help clients attain long-term capital growth using two investment mediums; Stocks and Shares ISAs and SIPPs. During this stage we will help you create an investment plan tailored to your personal circumstances. We will also show you how to maximize the probability of you achieving your objectives.

The overall goal is to help you arrive at your ISA and SIPP goals on time and save you thousands in unnecessary fees and charges. If at this stage you are satisfied with what has been presented to you, together we will move onto the next step which is called 'Implementation.'

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