

# Portfolio Review Form



**Bestinvest has spent over 20 years building and refining a service based on independent research and ensuring that our interests are aligned with our clients. In doing so, we are able to retain integrity at all times and focus on providing a service that we believe has the best value.**

**We believe that a carefully crafted portfolio with a diverse mix of assets is the most effective way of delivering your investment goals. Bestinvest can assist you to construct a framework that works for you. Our service provides professional, fully-qualified, investment advice and heavily discounted investment charges. We pioneered this concept in the UK and no other adviser has been able to match our combination of high quality research and low cost.**

## Free portfolio review service

For those clients who have portfolios held with Bestinvest of £50,000 or more, we are pleased to offer a free bespoke review of your ISA and other fund investments. To arrange your free portfolio review, please call our Investment Professionals on 020 7189 9999.

## Why do we offer this for free?

In our experience, investors are not always fully aware if their portfolio is set up to meet with their investment goals. Many have been selecting funds on a case by case basis and the result is that they are taking too much risk, through a lack of diversification. A free portfolio review allows you to see firsthand our research capabilities and advisory expertise.

## What can you expect?

You will receive an analysis of your existing portfolio of Collective Investment Schemes (i.e. Unit Trusts, OEICS and Investment Trusts), detailing where your investments are under or overweight across all major asset classes including equities, bonds, commodities, commercial property and hedge. The report will include a risk analysis comparing your overall risk in your portfolio to an appropriate asset model and the FTSE All Share Index. You will also receive a written summary to accompany the analysis detailing where changes can be made to the portfolio and identifying funds which have not been well managed or performed well.

## Benefits of a FREE portfolio review

- Highlight poor performing funds.
- Identify how much risk you are exposed to.
- Determine whether or not your current investments will meet your objectives.
- Reveal excessive/large holdings or sector exposures.
- Outline which investments contribute to risk.

**To obtain your free portfolio review, please complete the form on the reverse and return to: Bestinvest, PO Box 6266, London W1J 5EZ ➤**

**Tel: 020 7189 9999**  
**bestinvest.co.uk**

**bestinvest**

