

20+ YEARS – FOR THE RIGHT REASON

- At King & Shaxson Asset Management, we take clients' ethics and values and reflect them in their investment portfolio and have been doing so for over twenty years.
- The foundations of King & Shaxson Asset Management was built in 2002 on the back of CEO Wayne Bishop's desire to have his personal values reflected in his portfolio. Including his desire to avoid the evils of certain sectors, namely tobacco, whilst also wanting to invest positively.
- We support financial advisers in building long term relationships with their clients through the successful understanding of investing for positive change.

A STRINGENT 'MORE HUMAN' APPROACH

- Our screening process is as important to us as the financial investment process. We ensure that our investments meet the clients' expectations, and do not just tick boxes.
- We have a stringent negative screen in place, and will always avoid contentious areas to ensure clients have complete trust. This further cements the relationship between the adviser and their client.
- Avoiding data gimmicks, we combine a quantitative screen with our 'more human' qualitative screen, to truly understand an investment and its motive. Data serves but does not drive.

TRANSPARENT REPORTING

- In depth reporting and documentation provides transparency and ensures clients are aware of where their funds are invested, including reporting on the positive outcomes of underlying companies.

CONTINUAL SCREENING



- We review all underlying holdings periodically, including meeting fund managers and investment teams on an ongoing basis, in turn avoiding "greenwash", which has become prevalent.



COMPREHENSIVE OFFERING

- Advisers have access to our 'Ethical MPS', which includes 7 model portfolios, defensive to adventurous, as well as an income portfolio, and our range of 'Brighter World MPS' which include 7 portfolios ascending the risk level, targeting lower cost underlying investments suitable for more cost-conscious clients.

COMPETITIVELY PRICED



- King & Shaxson's annual management charge starts from 0.20%. For our Ethical MPS, it is tiered based on the total AUM at a company level, (not just on an individual adviser basis). For our Brighter World MPS, the charge is a flat 0.20%.

For Professional Clients Only. The information contained in this document is for general information purposes only should not be considered a personal recommendation or specific investment advice.

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