Specialist investment services

Depending on your circumstances, your financial adviser may also recommend you take advantage of one of our specialist investment services or fund solutions.

Fixed Interest Portfolio Service

Designed for those prioritising capital preservation over growth, this service invests in a well-balanced range of fixed-interest funds. Managed by our industry-leading team, it aims to provide a return that helps protect against inflation over the medium term.

UK Smaller Companies Portfolio Service

Smaller companies (often called small-caps) can offer good long-term investment opportunities. However, they're riskier – which means they're often ignored by investment management companies that lack the expertise to evaluate small businesses, spot opportunities, and invest on your behalf.

At Canaccord Wealth, we do have that expertise. In fact, we're among the most experienced UK wealth managers in this area.

Inheritance Tax (IHT) Portfolio Service

For those with a greater risk appetite, you can access our specialised IHT Portfolio Service. It's designed to minimise your exposure to inheritance tax (IHT) while also growing your wealth, so you can leave a stronger legacy for the people you care about.

Charities

Managing a foundation or charity's investments comes with unique challenges. Many of our clients act as trustees, and we have years of experience guiding charitable organisations. We'll ensure you have the right advice and provisions in place to help meet the objectives set out in your charity's investment policy statement (IPS).

Investing for US expats

If you're an American expat investing internationally, it can be difficult to find a partner that understands your specific challenges. Our specialist investment management team is highly experienced in helping US citizens invest abroad, allowing you to meet your long-term financial goals.

We'd be happy to provide more information about these services, which you can request through your financial adviser. You can also learn more on our website: canaccord-wealth.com

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Important information

Investment involves risk. The value of investments and the income from them can go down as well as up and investors may not get back the amount originally invested. The investments described in this document may not be suitable for all investors.

Investors should make their own investment decisions based upon their own financial objectives and financial resources and, if in any doubt, should seek advice from an investment adviser.

Any tax benefits depend upon the investor's individual circumstances and clients should discuss their financial arrangements with their own tax adviser before investing. The levels and bases of taxation may be subject to change in the future.

This document is for information only and is not to be construed as a solicitation or an offer to purchase or sell investments or related financial instruments. This has no regard for the specific investment objectives, financial situation or needs of any specific investor.

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