



Why

do Financial Planners
use Thesis?

Thesis Asset Management

Strategy, objectives, priorities

If you are amongst the new breed of Financial Planner who has moved on from transaction-based advice, your priority will be on the development of an overall investment strategy, the coordination of your client's objectives and management of risk levels.

The detail of identifying, researching, implementing and rebalancing the actual investments is a complex task, made even more so by increasing regulation and ongoing volatility in the markets.

Thesis is a specialist asset management company. We are clear about our proposition and the role that we can play in a collaborative relationship with Financial Planners to the benefit of your clients.

Our Investment Managers work on a fully informed basis. We continuously research a broad range of asset types such as individual stocks, corporate bonds, gilts, cash and property, to ensure that clients have a much more personalised portfolio than just the collective funds which most Financial Planners' regulatory permissions will allow them to recommend.

From your point of view, as a Financial Planner, we understand your business and your priorities. We enable you to focus on your core business, leaving you to manage the strategic financial planning for your client.

You will find us flexible and responsive. Thesis offers a choice of fee structures, remuneration terms and investment styles. Our investment solutions are compatible with a range of different tax structures. We can be as visible or low-profile as you require, depending on your own relationship with your clients or your business model.



Why Financial Planners use Thesis

More than half our client referrals come from Financial Planners who recognise that our specialist skills can complement yours to the benefit of your clients.

"The selection of Thesis as our discretionary fund manager of choice has helped us to increase our general funds under management as clients have readily bought into the hands-on and human approach of Thesis."

"All of the clients we have placed with Thesis remain intact and happy in the knowledge that they receive a very personal service and a bespoke portfolio. It is very rare in discretionary management circles to be able to deal directly with fund managers who are freely available to talk to clients and who operate a very transparent way of working. We remain entirely confident of Thesis' ability to manage client relationships and provide a 'safe pair of hands' investment approach welcomed by our own clients."

**Philip Warren, Director, City Assurance
November 2007**

"We refer clients to Thesis on the basis of our experience of their excellent fund management, ethical screening and administration."

"This relationship has had an extremely positive effect on us as a firm, knowing that there is an ongoing supervision of our clients' affairs - which we can trust. The same is true for our clients - they get to relax on the basis that their affairs are being handled in an adept, professional and appropriate fashion."

**Robin Currie, Director, Barchester Green Investment
October 2007**

"Working with Thesis has helped us to diversify our client portfolio and to present a broader, more individualised offering to our own clients."

"Building a solid relationship with Thesis has enabled Route Group to get to know the individuals within Thesis and to maintain a cohesive in-house investment view and style which can grow and preserve our clients' wealth. We have a Thesis Investment Manager in our offices one day a week to meet with clients. The direct contact between our clients and Thesis is good for everyone's confidence, and ensures that there is a really thorough understanding of each individual client's objectives."

**Mark Worrall, Managing Director, Route Group
November 2007**

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Thesis Asset Management plc and Thesis Unit Trust Management Limited are authorised and regulated by the Financial Services Authority.

Thesis Asset Management plc is an Inland Revenue approved ISA and PEP manager.

Investors should be aware that the value of their investments and the income from them can fall as well as rise and investors may not receive back the full amount they invest.

Past performance is not necessarily a guide to future performance.

Investments denominated in foreign currencies are subject to fluctuations in exchange rates which can be favourable or unfavourable.