Albemarle
STREET PARTNERS

A genuinely collaborative investment approach

Albemarle Street Partners is excited to be working with Standard Life as one of a limited number of Discretionary Managers on the new Individually Managed Accounts (IMA) platform.

Who are we?

"We are a small experienced team of investment professionals. We came together to form our boutique so we could work with a focused group of financial advice firms to build investment solutions which meet the needs of their clients. We believe it is financial advisers who know their clients best and so our job is to shape what we do around the advice philosophy of our partner firms. And because we work with a limited number of firms we can be genuinely collaborative on both the investment process and working together to deliver growth."

Charlie Parker, Managing Director

"We understand that every adviser firm is different. When we build solutions it is much more than a white-labelling exercise. We believe in bringing advisors into the heart of the investment discussion. We suggest every potential partner who is considering working with us speaks with our existing clients to determine whether we are the right fit for their business, so that each partnership is built on an open and honest foundation."

Eleanor Williams, Partnerships Director

What makes us different?

- A genuinely collaborative approach
- Commitment to building your brand
- Accessible, experienced team
- Shared investment committees
- Broad expertise across asset classes

What defines our investment approach?

- A record of consistent risk-adjusted returns aligned to a wide range of risk profilers
- An evidenced-based approach to seeking the most consistent returns possible
- A meticulous focus on cost when choosing between active or passive investment selections
- Deep expertise across a range of asset classes and in both directly-invested and collectives-based portfolios

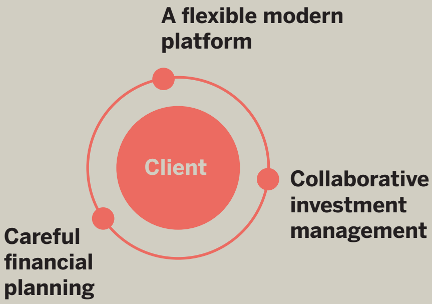
Fahad Hassan, Chief Investment Officer

"At Albemarle Street Partners we understand that the inflation and interest rate backdrop is the key driver of asset class returns and we use this knowledge to build robust, well diversified portfolios for our clients."

Why do we believe Standard Life's Individually Managed Accounts are a great option?

"We believe advisers should have a free hand when choosing their investment platform. Standard Life's Individually Managed Accounts offer us the ability to manage the accounts of even significant high net worth individuals with flexibility."

Chris Holdoway, Investment Director



The enhanced functionality of the Standard Life IMA platform allows investment managers to offer an increased level of service in portfolio management for advisers in the following areas.

- CGT management
- Auto ISA enrollent
- Exclusions and Legacy Assets

Portfolio Management We believe that the relationship between an adviser and their client is the most valuable and therefore do not apply any charges for additional services offered beyond the discretionary portfolio management fee of 0.25% plus VAT for collective fund portfolios or 0.4% plus VAT for portfolios including direct securities. The minimum investment size for an individually managed account on Standard Life managed by Albemarle Street Partners is £200,000.

The Albemarle Investment team

Charlie Parker - Managing Director
Charlie is responsible for the overall strategy of Albemarle Street Partners. He was previously the head of portfolio management for Sanlam UK and a director of Neptune Investment Management. He begun his career as an investment journalist and commentator for both the print and broadcast media.

Fahad Hassan - Chief Investment Officer
Fahad is a CFA Institute charter-holder with extensive experience managing investments for institutional and retail clients across the world. He previously worked for Legal & General Investment Management for 11 years where he managed over $1 billion.

Clive Hale - Chief Strategist
Clive is a former CIO of Skandia Investment Management and Investment Manager and Consultant at Towry (now Tilney BestInvest) and John Scott & Partners. He has over 35 years' experience of fund research, asset allocation and portfolio management.

Tom May - Group Chief Investment Officer
Tom May is the group chief investment officer for Atlantic House Fund Management and Albemarle Street Partners. He also manages the £1.2 billion Atlantic House Defined Returns Fund. He was previously head of European Securitised Equity Derivative and Secondary Market Trading at Citigroup.

Russ Bubley - Quantitative Development
Russ shapes our modelling and risk analysis and sits on the Albemarle Street Partners investment committee. Russ has worked in a variety of corporate, investment banking, and asset management roles since 1997 and is an expert in complex financial products, mathematical modelling and risk management.

We are a team of experienced investment professionals with a broad range of skills and expertise who are on hand to speak to you about your investment portfolios at any time:

Contact us

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