

Introduction

How we can help you achieve your financial goals

YOU has a range of qualities that demonstrate the skills and expertise your financial adviser has chosen when helping you to achieve your financial goals. You will find a few of those highlighted below:

About Us

YOU is an award-winning wealth management business that started in 2004.

We have over £1.5 billion in assets under management for private clients, trusts, charities and corporate bodies.

We have a proven track record of performance which we are happy to share with you.

Our Team

We have an investment team with extensive knowledge and proven expertise.

Spanning three decades, our team has over 160 years' experience within the industry.

Detailed biographies of our team members are available from your adviser.

Our Investment Solutions

We offer a broad range of investment solutions that will meet the vast majority of your needs.

We can execute a financial investment plan for you and tailor this over time to continue to meet your changing needs.

We can work with you and your financial adviser to help you achieve your lifetime financial goals.

We recommend that potential investors seek professional financial advice before making any investment. YOU Asset Management Limited is authorised and regulated by the Financial Conduct Authority. The material in this presentation has been prepared by YOU Asset Management and provides background information about YOU Asset Management's activities as at the date of this presentation.

Awards & Industry Recognition

Multi-Asset Group of the Year, 2020 (Investment Week) - Winner

The judges said; "This winning Group offers cost-effective multi-asset funds run by a knowledgeable and experienced team.

They give good clear explanations of their investment approach, with a real commitment to deliver good products overlaid with excellent communications to investors."



Best Discretionary Fund Manager, 2019 (Money Marketing) - Winner

The judges for the Best Discretionary Fund Manager had a host of reasons why YOU (formerly known as Beaufort Investment) took the top prize; its performance, literature, and transparency proved to be the key differentiators from the other shortlisted DFMs. Regarding its literature, one judge said: "If you're going to show them to a customer, you want to see something like this."

The YOU quarterly reports were particularly highly regarded by the judges. Its website shows true transparency over performance, how money is run and what is going on in the market in an "easy and straightforward" way.

