
CASTERBRIDGE WEALTH
INVESTMENTS
For professional advisers only

Our story

We are an independent award-winning Discretionary Fund Management business, inspired by the lack of choice and variation available to Financial Advisers.

We offer something different to the Financial Adviser Profession: *Independent, Adaptive, Responsive and Agile Investment management for your clients.*

We focus on supporting the interests and success of your business and work with you to deliver your clients' needs.

We are truly active – delivering the highest levels of service & performance are at the core of everything we do.

We are

Believers in truly active investing.

Passionate about delivering excellent service & performance.

Dedicated to you.

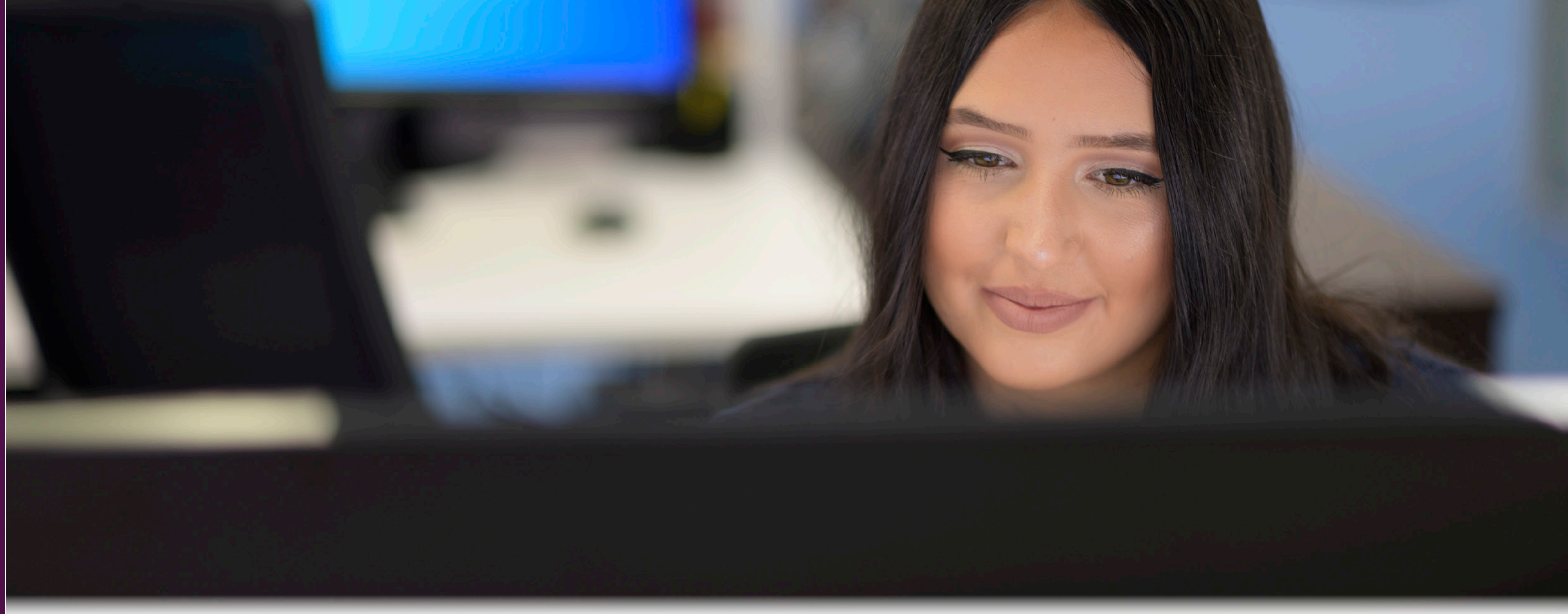
Your complete investment partner

Keith Edwards and the team at Casterbridge provide an excellent service to my clients that goes above and beyond and makes them feel not only valued but close to their money and how it is being managed.   I would highly recommend Casterbridge for both their investment expertise and their customer service.

- Abi, Chartered Financial Planner, Newton Abbot

We all know there's a shortage of advisers, the team at Casterbridge really understand what IFAs are looking for when outsourcing to a DFM. I believe IFAs should be sticking to what they are good at and concentrating on the financial planning needs of clients and leaving investment management to the investment managers!

- Jon, Financial Planner, Bournemouth



The complete investment service

We offer a number of products and services including our highly personalised Bespoke Portfolio Service, our widely available Hardy Managed Portfolios and our Sustainable Impact models for clients with Environmental, Social and Governance (ESG) considerations.

We are able to develop unique investment solutions designed around your requirements, such as restricted universe portfolios and joint venture opportunities.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Investment solutions

Bespoke portfolios

Bespoke portfolios offer your clients the very highest in investment personalisation. We will provide your client with a dedicated investment manager who will build and manage their portfolio on a real-time day-by-day basis, totally focused on their objectives, goals and aspirations.

Hardy managed portfolios

The Hardy Managed Portfolios offer you & your clients' access to the very best asset managers both active and passive from across the globe, selected by our in-house research team. You have a choice from a number of risk-mapped portfolios to meet your differing client needs.

Sustainable impact investing

For clients with Environmental, Social and Governance (ESG) considerations, we offer a range of Sustainable Impact models, available via Bespoke and Hardy Managed Portfolios.

Casterbridge was born out of the lack of choice available to IFAs in the DFM arena. Coming from one of the incumbents I set up Casterbridge to be agile, adaptive and of independent thinking. Our aim of delivering you and your clients the highest quality investment products & services lies at the core of our DNA.

-Keith Edwards,CEO

KEITH EDWARDS

CEO & Chief Investment Officer

Investment principles

Our investment beliefs are based on a truly active approach, giving us the best opportunity to take advantage of market movements.

Our flexible approach to strategic (longer term) and tactical (shorter term) asset allocation, stock selection and combining in-depth analysis from our internal research team, together with the experience of our investment managers, allows us to focus on your clients' objectives, goals and aspirations in real time every day of the week.

Our active approach

Our independent investment management process sits within a rigorous risk management framework, designed to sit seamlessly within your Advice Process.

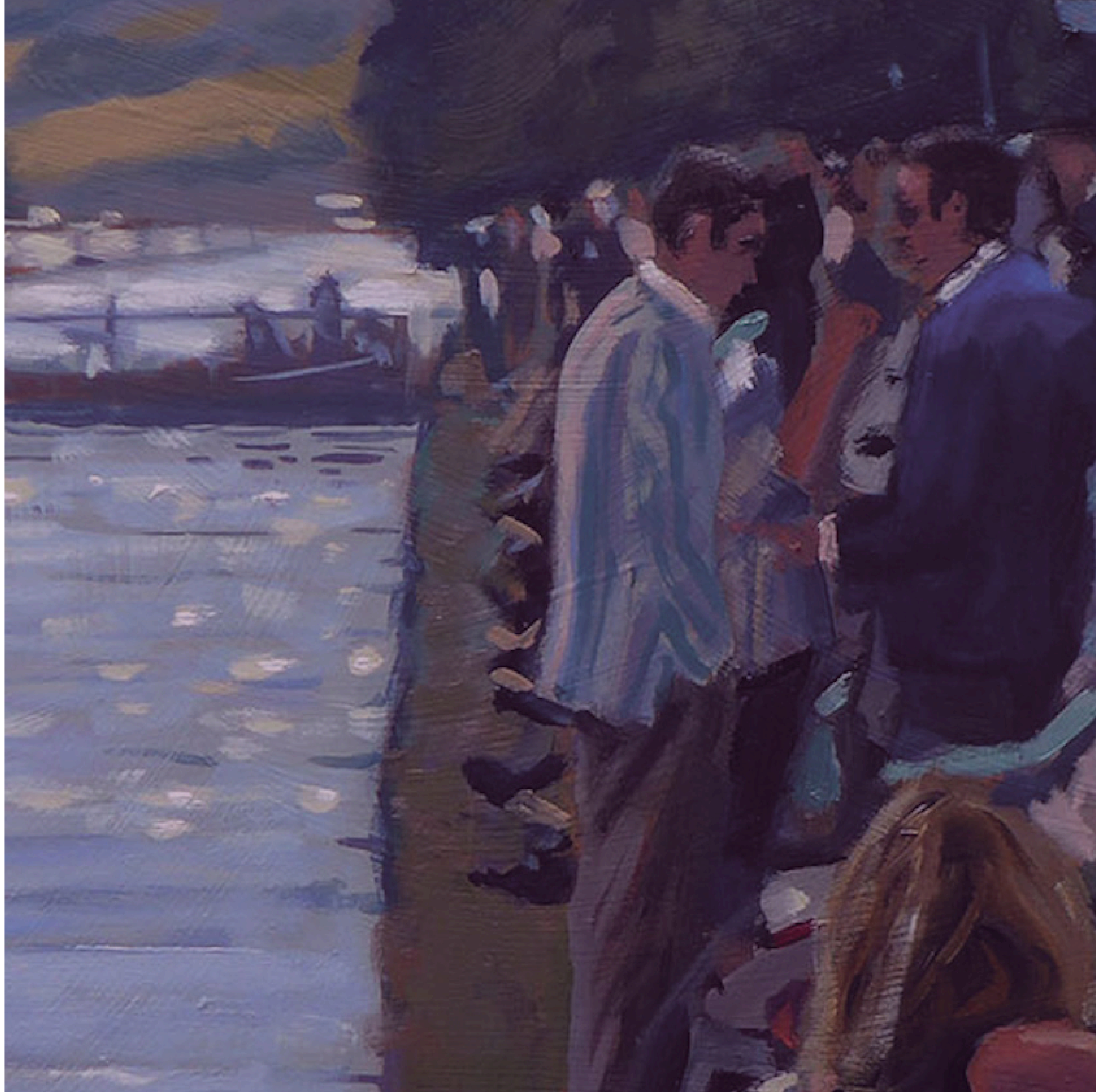
Personal service is at the heart of everything we do.

Partners Matter

We work closely with a number of global partners to ensure the safety and security of your clients' assets.

We have partnered with Raymond James who are our administrators, they facilitate the purchase and sale of your clients' assets. Working closely with Raymond James are the Global Bank of Pershing Securities. Pershing provide the vital role of custodian, maintaining the safety of your clients' assets in ring-fenced accounts.

For clients invested in our platform based Hardy Managed Portfolios & Sustainable Impact models, we work closely with a number of market leading platforms.



Important information

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Investors should be aware that past performance is not an indication of future performance, the value of investments and the income derived from them may fluctuate and you may not receive back the amount you originally invested.

Your Complete Investment Partner

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