Advised Investment Service

What is it?

Our Advised Investment Service allows you to remain in complete control over all decisions made on your portfolio, whilst benefiting from our award-winning advisory wealth management, dealing and custody services.

Why Killik & Co?

Founded in 1989 as an Advisory Stockbroker, our heritage and expertise stems from our knowledge of financial markets and our ability to help our clients build the right investment strategies. We offer superior and efficient global market access across all asset classes and are also able to offer our services in a number of major foreign currencies.

Who is it right for?

For anyone looking for a partner, a peer with whom you can discuss your portfolio, we remain one of the last investment houses committed to offering real investment advice. It is not just for seasoned investors and is perfect for anyone looking to gain experience and confidence in managing their own portfolio, aided by your dedicated Investment Manager.

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The Service

Led by your dedicated Investment Manager, we will advise you, in line with your circumstances, on the appropriate asset classes and tax-efficient strategies available to you, whilst also assisting you in the construction and management of a portfolio of investments to meet your needs.

In addition to the advice of your dedicated Investment Manager, you are able to make the most of our in-house research. Via email, our App and Client Portal, you have complete access to our investment research, which is frequently referred to in the national press and includes our 'Daily Note'. Many of our Advised clients also refer to our educational video series 'Killik Explains', which covers a broad range of topical investment issues, alongside our weekly summary of the markets, 'Market Update'.

Research Process

We are truly unbiased in our outlook: with no external parent, public shareholders or hidden conflicts of interest, our focus is solely to serve our clients. We think long term; we are not traders or short-term thinkers and recognise that a global economy demands a global investment approach.

Our meticulous and independent research takes a long term, global and thematic approach to gain a deeper understanding of exactly why and how the world is changing. By taking these important themes of tomorrow and combining them with advice to help manage unpredictable market forces, we are able to help our clients construct their own well-diversified, genuinely global portfolio, and keep it in line with their objectives at all times.

Please Be Aware

As is the very nature of investing, the value of your investments will rise and fall overtime. We devote our time to sourcing the very best investments to meet your objectives, however please do not assume that past performance will repeat itself and you must be comfortable in the knowledge that you may receive less than you originally invested.

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Portfolio Review Fee

0.95% for the first £1m (all inclusive*)

0.8% thereafter (all inclusive*)

** The annual fee includes unlimited transaction charges. For investments settling in a currency other than GBP we apply a Foreign Currency Exchange charge: 0.5% for trades under £30,000 and 0.35% for those £30,000 and above.*

- *This service is not subject to VAT*
- *These fees will automatically be taken from your Killik & Co account in March, June, September and December. They will be based on the total value of the investments in the portfolio excluding cash at the end of February, May, August and November for the previous quarter.*
- *Fees for trades with exceptional features or complexity will be subject to further agreement*
- *Please see www.killik.com/our-charges for any incidental charges that may apply to your account.*