



INTELLIGENTMONEY

3-Dimensional Investing

Internal risk management within our target dated portfolios gives the optimum strategy for each investor at every stage

3-Dimensional Investment Management

Your goals, requirements and time frames are unique. We therefore ensure the management of your investments is too.

Regardless of whether you are building wealth or drawing down an income from it, it is important that your money is being managed in a way that always puts the preservation of your capital first.

This is precisely what the IM Optimum Portfolios are designed to achieve. We combine advanced technology with bespoke discretionary investment management to create 3-dimensional investment solutions.

This delivers target dated investment portfolios where risk is managed internally and rebalanced on an ongoing basis based upon your age, the time remaining available for growth, and end requirement for your money – a lump sum for withdrawal or a lump sum to produce an ongoing income – so you can optimise your investment return without taking unnecessary risks.

So whilst capital risk can never be completely removed from market based investments, we believe our diversified target dated approach can help minimise this.