



Schroder Family (B): Investment  
Strategy and Asset Allocation

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## *Introduction*

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A high-level professional service that combines financial/investment advice, accounting/tax services, retirement planning and legal/estate planning for one fee. Clients work with single wealth manager who coordinates input from financial experts and can include coordinating advice from the client's own attorney, accountants and insurance agent. Some wealth managers also provide banking services or advice on philanthropic activities.

*In other words...*

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It is basically an investment advice or assistance to manage a person's financial life. These services are offered to clients in packages to provide benefits with two main goals growth and safety of their existing investment.

# *Types of Wealth Management Service Providers*

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Banks- Banks are known to have larger investment distribution model which means that they do not concentrate on only investment options but on a large investment portfolio.

Brokerage Firms- Brokerage firms focus on investing the customer's money majorly in shares and IPO which are equity market products.

Boutique advisory firms- Boutique advisory are known to provide customized financial solutions to the clients which are majorly.

# *Type of Industry*

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Wealth management as an investment-advisory discipline incorporates financial planning, investment portfolio management and a number of aggregated financial services.



**How do you make your  
money  
work for you?**

# *History*

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1896-1929

Prior to the great depression, investment wealth management was in its golden era, with the industry in a prolonged bull market. JP Morgan and National City Banks were the market leaders, often stepping in to influence and sustain the financial system. JP Morgan (the man) is personally credited with saving the country from a great panic in 1907.

# Advantages

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- Work through the maze of retirement options and put you on course for the retirement you've always dreamed of.
- Avoid costly mistakes, manage risk, save time, and improve your overall financial investment results.
- Create long term wealth and achieve your personal finance planning goals and objectives.
- Determine the type and amount of insurance you need to protect yourself, your family and your assets.
- Improve the efficiency with which assets can pass on to your loved ones in the event of death.



## Software, Vendors, and URL's

### Software

AIM

FC Portfolio

Vestserve

iBalance

### Vendors

Td Ameritrade

E-Trade

Fidelity

Scottstrade

### URL

<http://finance.yahoo.com>

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