

# How best to invest YOUR NEST EGG

**W**hether you have £5,000 or £50,000 tucked away for a rainy day, stockbroker Walker Crips can provide expert guidance on how best to invest your nest egg.

Neal Stevens, investment manager at the firm's Birmingham office, says that smaller portfolios of under £150,000 are not uneconomic and can still be well-served and attractive business.

He said: "We are choosing not to move away from providing a bespoke service for clients with modest portfolios as it would mean turning our back on long-standing, loyal clients.

"With no specified minimum we prefer to address clients' needs and preferences together with them in order to offer them a suitable investment solution.

"We want to continue to provide clients with the service they want, having listened to their story rather than force them into a product that only suits a corporate approach."

As a stockbroker, Neal manages a financial portfolio of stocks and shares for his clients – from

individuals with savings to invest to companies and large organisations. It is his job to get the best financial return for his clients by buying and selling stocks, shares and other financial products.

Walker Crips offers two types of service:

Discretionary – managing all of the client's investments and making decisions on their behalf.

Advisory – advising the client about various investment options.

Neal added: "Investing in our own technology puts us in a strong position to continue to provide a tailored service to clients, without costs escalating, due to our efficient back office, platform and systems, which are supported by our own IT team.

"Regulatory changes in the form of MiFID II are looming at the start of 2017 and we hope that, as a result of regulation, other firms do not leave clients in the lurch by shutting up shop on the advisory side.

"We will continue to offer clients choice from a broad range of services in the manner that suits both large and small portfolios."



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STOCKBROKERS

## Has your broker withdrawn their service?

### Are your investments looking for a new home?

- Probate and Estate Management ■ Share Dealing ■
- Wealth Management ■ Investment Management ■
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Including NISAs Including Self Invested  
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