

A unique service that ensures you always achieve the best rates, in the right savings accounts, for trusts

In order to remain compliant with the Trustee Act 2000, trustees must obtain and consider proper advice about the way in which funds are invested and investments held within a trust should be regularly reviewed.

Where cash assets held in trust are concerned this is no mean feat, as there is no consistency between providers on which accounts are open to trustees, let alone which providers accept trust money. With over 10,000 rates to monitor, to ensure cash stays on the best rates, it can be an extremely laborious and onerous task. Well, it was until now...

By introducing the Concierge Managed Savings Service with SavingsChampion.co.uk, you are providing a simple, cost-effective way to get the best returns on cash held in trusts. It is unique, market leading and the only truly whole of market service.

We pride ourselves on innovation and providing a service that gives you so much more, tailoring our service to each client's individual needs and circumstances. Our service is designed to take the hassle away from the trustee, while remaining responsive, transparent and safe.

How it works

- Initial telephone consultations are always without obligation
- Creation of bespoke portfolios and reports without obligation - allowing a trustee to instantly see the best returns that the trust's cash assets can achieve
- Administration work is minimised, as we provide pre-populated application forms and prepaid envelopes, for new savings accounts
- We monitor the progress of applications right through to the successful opening of accounts
- We ensure the cash assets continue to achieve the very best returns, by monitoring the whole market, selecting new accounts and completing ongoing administration work
- Accounts are only opened in the trustee's name, directly with each savings provider; this means only the trustee can access the funds
- Cash assets can be protected against the failure of a bank or building society (or risk limited) by making full use of the Financial Services Compensation Scheme (FSCS) and HM Treasury backed compensation
- Our service is flexible and all types of trust can be supported



Giving you more

The Concierge Managed Savings Service for trusts from SavingsChampion.co.uk comes with many extra benefits:

Benefits for the lawyer / accountant

- Free helpline – 0800 321 3582
- Service can operate independently or under your oversight
- Access to unrivalled research and data
- Peace of mind that you are recommending the best possible solution for cash held in trust

Benefits for the trustee

On top of ensuring that you are compliant, the trustee also benefits from:

- Certainty that you are getting the best returns
- Knowing that you are fulfilling your obligations to the settlor and beneficiaries
- Peace of mind that the cash assets are fully protected or that you have spread risk appropriately
- Minimal hassle, as we complete administration work on your behalf
- Dedicated account management and customer service teams to ensure you are supported

Benefits for the beneficiaries and settlor

- Best return on cash assets
- Income can be taken by settlor or beneficiaries, if the trust allows
- Risk of loss caused by the failure of any one bank or building society is eliminated or reduced
- Low fees of 0.1% of the cash assets to implement the service and 0.2% per annum in ongoing management

Why choose us?

Choosing to work with us is choosing to work with an organisation that has a proven reputation for reliability, innovation and excellence.

With over 20 year's in-house unbiased specialist savings experience, we have the know-how to effectively manage savings portfolios of all sizes. Our recommendations evidence our whole of market status by detailing any other accounts that pay slightly better interest rates, together with the reasons why we consider them to be unsuitable. Our managed savings services can be used by private individuals, corporates, charities and trusts. In the first half of this year (2014) alone we have helped over 100,000 savers maximise the return on their savings through our unbiased services.

We offer:

- Total independence - we monitor all savings providers, which is over 4,000 accounts and 10,000 individual savings rates, to secure the best returns available
- An unrivalled research service to ensure the savings providers and accounts chosen are appropriate to your trust
- Dedicated account management and customer services to ensure that you and the people you are engaging are fully supported when needed
- The reassurance of knowing you're working with a highly regarded provider of unbiased advice, services and savings data. We regularly feature in the national press giving our expert views and advice on savings and savings accounts, in publications such as the Sunday Times, Telegraph and Mail on Sunday. We are also regular contributors to Radio 4's Money Box program, BBC News and Breakfast
[Click here for recent press coverage](#)
- A customer centric service - effective collaboration with the client's other professional intermediaries, for example lawyers, accountants and financial advisers, facilitates a joined up solution, in the best interests of the client

"Savings Champion is the best innovation in savings I have seen in recent years – comprehensive rate tracking, coupled with unbiased help in finding better deals is exactly what savers crave"

- Dan Hyde, Deputy Personal Finance Editor,
Telegraph Media Group

About SavingsChampion.co.uk

We help individuals and organisations achieve the best rate of return with the level of security they require, without the hassle.

Our unique and unrivalled solutions:

Impartial Best Buy Tables genuine best buys selected from the best available, not by commercial arrangement. For your convenience these can be regularly delivered via email for free.

Rate Tracker © loyalty rarely pays for savers. Some banks lure in new customers with tempting rates only to reduce them over time. Rate Tracker is a market leading free service for private individuals that monitors your savings rates and alerts you when it is time to get a better deal.

Rate Alerts we'll email you for free when new competitive rates hit the market. As always, you can be sure our information is unbiased.

Concierge - Managed Savings Service ensures you always achieve the best rates, in the right accounts for your savings needs, delivering maximum returns for you, your business, charity or trust for a small fee.

Complete satisfaction guaranteed.

Enquire Now