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Investec



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Investec Wealth & Investment is sponsoring the Legal and Business Advisory category

INVESTEC Wealth & Investment (IW&I) is proud to be a part of the Birmingham Post Business Awards 2014. With a strong presence in Birmingham and the wider Midlands region, we are in a strong position to help the extensive Midlands legal community with investment management services, both personally, and for their clients. We work with the professional service community to provide a market-leading range of investment and advice services.

IW&I now has around £24 billion of client funds under management and 15 offices across the UK, including a major presence in Birmingham at Colmore Plaza. Established in 2005, the firm's Birmingham office now has 36 staff. The office works with a large number of professional advisers to provide their clients with the highest level of service and



➤ **Adrian Quin, head of the Birmingham office at Investec Wealth & Investment**

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to meet their individual bespoke investment requirements.

IW&I is benefiting from strong fund inflows, driven by excellent client service and strong, long-term investment portfolio performance, and on a nationwide basis is hiring new talent to cater for new client demand.

Over the years, some acquisitions – such as the purchase of Williams de Broë in 2012 – have played an important part in the development of IW&I in major cities including Birmingham. Across the UK, IW&I has executed a strategy to build a major force in the UK's investment management industry.

The growth in investment assets has been achieved during a period of market volatility by investing in the business, particularly in research and service capabilities.

Research is the critical factor in our business and we believe our dedicated research team of 18 has market leading quality and experience. The research team understands our clients' mindset and gives our Investment managers a distinct competitive advantage.

This high level of service continues to be recognised by a number of influential market commentators.

This year, for example, IW&I was the only firm to be awarded two Regional Stars at the prestigious Citywire awards in March. Last year, IW&I won Private Client Asset Manager of the Year (Institutional) at the 2013 Citywealth Magic Circle Awards, while the firm's business with independent financial advisers was recognised when it won the 2013 Best Discretionary Fund Manager award at the esteemed Fund Manager of the Year awards.

Adrian Quin, head of the Birmingham office at Investec Wealth & Investment, said: "IW&I offers a comprehensive range of investment services, from

bespoke portfolio management for private clients to a full discretionary fund management proposition for financial advisers. Investment services are provided for a range of clients, including private individuals, companies, trustees, pension funds, personal injury claimants, and charities.

"Being part of the Investec Group, IW&I and its clients have access to significant research capabilities, international and cross-border investment management experience, and the ability to provide innovative financial services.

"A good example of such innovation is IW&I's AIM Portfolio IHT Plan, which invests in a portfolio of qualifying companies selected from the London Stock Exchange's Alternative Investment Market. It reduces both clients' IHT liability and gives them the potential for equity-related returns."

With a history dating back to 1827, IW&I has been a leading player in the investment and discretionary wealth management space for many years. IW&I has now become one of the core pillars of Investec Group: around 1,000 of Investec's 3,000 UK employees now work within Wealth & Investment.

The firm's market position has strengthened significantly over the past five years and it has a focused development programme to engage in and grow market share across all selected markets.

In terms of the Midlands and wider region, Investec Wealth & Investment has become a significant – and growing – part of the Birmingham business and wealth management scene.

The firm is well positioned to work together and build long term relationships with the Midlands professional service community.

