

Careful investment for a lifetime of support

Rathbones Court of
Protection and personal
injury services



Rathbones
Look forward

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Specialist support for your specialist role

The responsibility of being appointed a Court of Protection deputy or trustee requires specialist support. Rathbones Court of Protection and personal injury investment team provides that expertise.

Drawing on our extensive experience in the sector, we can help you achieve the dual objectives of protecting capital value while providing regular secure income for your clients.

Our services are built on sound investment management, focused solely on each individual's unique requirements. With the right plans in place – and well-honed, proven processes for adapting and evolving them as circumstances change – you have the best possible chance of maintaining your clients' long-term wellbeing, even in the most difficult of situations.



A focus on protection and growth

Safeguarding your clients' capital and providing a solid lifetime income requires in-depth, detailed understanding of the complexities of Court of Protection and personal injury matters.

We work in close collaboration with deputies and trustees on a regular basis. Your clients would be joining similarly placed individuals who are already benefiting from our services, with portfolios that range from hundreds of thousands of pounds to more than five million.

Deputies and trustees value our sector specialisation and knowledge of their requirements. Our focus is on developing and managing the agreed investment strategy needed to meet the very specific demands of Court of Protection and personal injury clients.

Make a direct connection

We understand the trust needed when working with external advisers, so we are here to be part of your team. Our role as specialist investment managers is to complement your role as your clients' deputy or trustee.

A great strength of our service is that you deal directly with an investment manager – the person looking after your clients' money – rather than an account team or relationship manager. Clarity and consistent communication are hallmarks of your relationship with us.

You will receive regular updates on the performance of your clients' portfolios, with information also available online. For a more in-depth analysis, your investment manager will review strategy and performance with you every year, or more often if you prefer.

Being accessible has helped us build long-standing relationships with deputies and trustees throughout the UK. Many say they like to talk face-to-face about their clients' investments. Through this personal relationship, our investment managers can make the right decisions for you and your clients.

Your clients' priorities are our priorities

Our focus on each individual client means their financial priorities are always our priorities. Your Rathbones investment manager will take the time to understand the precise long-term strategy you want your clients' portfolio to follow and how you want us to work with you in your role as deputy or trustee.

We will create an individual strategy and portfolio to match your clients' income and growth targets, balancing both ethical and financial goals and accommodating any appropriate restrictions.

To make sure our recommended strategies and portfolios are truly tailored, we search the whole of the market to meet your clients' goals. The flexibility to access investment opportunities globally isn't something you will find with every investment firm, but we believe it's critical if you want to make the right investment choices.





The flexibility to act

Your clients' needs will evolve over time. Funding, income and expenses can all vary from year to year, affecting their financial position and future plans. Even changes in government policy and regulation can have far-reaching impacts.

An advantage of our individual approach to portfolio management is that it's easy for your investment manager to adapt the investment strategy if circumstances or requirements change.

Keeping a constant eye on the markets and wider economic environment, active, day-to-day monitoring enables us to move quickly to protect investments and continue progress towards their agreed objectives.

A tried and trusted process

Consistency and accountability are critical to long-term success. Our investment approach is designed to achieve consistent returns for your clients, and our investment managers are accountable for every decision they make.

They are supported by a central investment process that provides expert guidance on asset allocation, investment selection and risk monitoring. Our managers have access to the insights and resources of our research team and are assisted by proprietary systems that use the latest technology.

With very low turnover among our investment managers, we are able to maintain long-term focus, supported by a stable operating platform. Its dependable performance is central to our reputation for high satisfaction ratings from deputies and trustees and regular awards for client service.



Clear on charges

Value and transparency drive our relationships with our clients and you will see these principles at work in how we charge for our services.

As one of the UK's leading investment managers, our scale allows us to provide a high quality service cost-effectively and our fees are straightforward.

We charge management fees for all portfolios. There are no additional investment management charges for transactions or administration. So you and your clients know what to expect, we provide a clear breakdown of the expected annual fees as part of each investment proposal.



Get in touch

To arrange a meeting, please get in touch

For more information, please call us on
020 7399 0000 or visit rathbones.com

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