Services Summary

The Elgin range of wealth management services delivers a multi-solution approach designed to cater for most investors' needs. Each is designed with a certain profile in mind; from savings accounts & managed portfolios to bespoke & advisory for the established investor. Management is conducted according to a pre-agreed risk profile when it comes to making investment decisions or suggestions.

An Elgin Investor Questionnaire should be completed for every case to establish the investor's risk profile prior to investing.

Capital Builder
Regular savings account providing access to risk-rated ETF portfolios managed by specialist managers within pre-determined parameters set by the Elgin Investment Committee.

- Available via Interactive Brokers only
- Minimum initial investment of 10,000 $/€/£ with regular contributions from 1,500 $/€/£ per month
- Strategies are managed and rebalanced quarterly to maintain the asset allocations
- New monies received will be allocated quarterly

Capital Management *Lite*
The same range of ETF portfolios as 'Capital Builder' from 25K $/€/£ suitable for investors who wish to choose from a range of managed portfolios with a single premium with ad-hoc additional investments.

- Available via Interactive Brokers only
- Minimum initial investment of 25,000 $/€/£ with optional ad-hoc contributions of 5,000 $/€/£
- Strategies are managed and rebalanced regularly to maintain the asset allocations
- New monies received will be allocated upon receipt

Capital Management
Bespoke portfolios, micro-managed by a specialist manager according to an agreed risk-profile within pre-determined parameters set by the Elgin Investment Committee.

- Available via Interactive Brokers, life companies and private banks
- Minimum initial investment of 100,000 $/€/£
- Strategies managed and rebalanced whenever necessary to maintain the asset allocations
- New monies received will be allocated upon receipt

Direct access to portfolio managers for queries regarding rationale and investment decisions. May include individual shares or bonds and a degree of input from the client to take in to consideration preferences and potential restrictions.

Advisory+
For investors that wish to maintain control of their assets; they will have direct access to the Elgin Portfolio Management Team to make educated, informed investment decisions. This service is specifically designed for sophisticated investors that know where, and how much they want to invest but understand the value of our opinions, information, research and analysis.

- Available via Interactive Brokers, life companies and private banks
- Minimum initial investment of $500,000 or currency equivalent
- Suggestions are made in accordance with the client's risk profile
- Final decision on choice of security and timing is the client's

Thematic and Unit-linked Portfolios (full details on request)

- Income
- Best Ideas
- Emerging Markets

Capital Builder | Capital *Lite* Management | Capital Management | Advisory plus | Global Thematic