Elgin Wealth Management

Elgin the online choice

Fintech and the retail investor

Elgin Platform

Reduced fees and security are the most sought after features when it comes to helping investors achieve the returns they seek in today's extremely low interest rate environment.

In conjunction with a leading custodian, Elgin now delivers a low-cost, highly secure online account to meet demands by providing a totally transparent, fee-based service.

- Relationship-managed personalised solutions
- Very low expense ratios that maximise returns
- 100% penalty-free liquidity

Execution-only accounts have been around for years; today's technology is extremely efficient, reliable and above all - secure. However, we find many investors are not totally comfortable with these types of accounts for a number of reasons, including:

- Some Investors get absorbed by the technology and forget they are using real money
- There is no relationship between an online account holder and a professional manager, leaving investors isolated when it comes to investment decisions
- Novices not familiar with the intricacies of capital markets can make costly mistakes

The platform we use is designed with the professional manager in mind, which is why our continued presence overcomes these issues by being available throughout the entire process, including;

- Account opening procedure
- Personalised risk profile assessment and asset allocation
- Ongoing management, advice, support and reporting

We issue instructions on the investor's behalf via multiple exchanges around the world all from a single account that provides market data 24 hours a day for:

- Stocks, Bonds, ETF'S & CEF'S
- Derivatives
- Foreign Exchange

Cost-efficiency is one of the most prominent features of internet based platform accounts. Whether it is deploying spare cash, or retirement planning, investing is a serious business so every percentage point saved counts when it comes to results.

Available Services

Capital Builder

The Elgin Capital Builder is a unique savings product specifically designed to bring relationship-managed low-cost savings solutions normally associated with wealthy investors to every investor with a capacity to save.

Capital Management Lite

This service is available at a lower entry level and is suitable for investors who are free to choose from a range of risk-rated, managed portfolios.

Capital Management

Bespoke portfolios, micro-managed by a specialist manager within pre-determined parameters set by the Elgin Investment Committee. Direct access to portfolio managers for queries regarding rationale and investment decisions.

Income Portfolio

This predominately holds assets that yield income, typically dividend-paying stocks and bonds with higher interest payments. Its purpose is to provide an income stream from your investments without having to tap your principal.

Advisory

This service is specifically designed for sophisticated investors that want to retain control of their investments but demand information, research, analysis and opinions to allow them to make educated, informed investment decisions.

Theme Portfolios

Themes are an excellent way to add diversification in the form of satellite portfolios aimed at niche areas. We currently offer specialist selections that focus on: Income, 'Best Ideas' and Emerging Markets. More information available on request.

Reporting

Generate daily, monthly and yearly activity statements to keep you informed on performance, trades and asset allocation every step of the way.

- Customised statements
- Real-time trade confirmations
- Performance tracking versus chosen benchmarks

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