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Making Your Life Easier

A valuable part of our overall service is the administration of our clients' investment portfolios which leaves them free from the burden of associated paperwork and therefore able to spend their time doing whatever is more important to them.

Sometimes our clients have other small investments "lying about"; these may be flotation shares from a building society or a life insurance company, privatisation issues, inherited stocks, or in some cases ISA or PEP investments arranged in the past. We are frequently asked whether these can be included within a client's BRI portfolio, which of course they can.

If you have such holdings in your own name or held elsewhere and would like to simplify your administration, reduce the amount of paper you receive through your letterbox and include these in a coherent investment strategy then please do not hesitate to call your usual BRI contact.

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