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### **Excellent Client Service is What we Strive For**

The more we talk to our clients the more we realise how much they appreciate our traditional, professional and personal management style.

Many of the new clients who have moved to BRI over the last few years tell us how pleased they are to get the friendly, professional service they had been missing elsewhere. The things we put so much effort into providing seemingly get overlooked by many of our competitors.

Often it is apparently small things that matter the most: easy access to the same investment adviser, face-to-face meetings wherever and whenever the client wishes, no call centres, and concise and straightforward reports. These things are not just a question of style and presentation, they really matter. Even more importantly we think all our clients are entitled to the same high quality service regardless of the size of their investment portfolio.

Many firms now insist that smaller portfolios are run on a very restrictive basis perhaps only containing collective investment funds and even, in some cases, a single in-house fund of funds.

At BRI we are determined to offer our clients a flexible approach to managing their investments: some want a mixture of different investment types whereas others prefer to hold only individual equities. We believe it is our job to explain the features of different portfolio types and then guide our clients to find the one that suits them best, not force them down a path that does not really suit them.

We encourage our clients to contact us about their investments as often as they wish; the better we understand what they want, the better our service will be.

Over the last year we have invested in additional people and new systems and this process will continue in our effort to provide the best service possible. We hope any changes you see will be improvements but if ever you feel our service is wanting, please let us know so that we can address the issue.

I hope you enjoy this edition of our newsletter; we have tried to include articles we think you will find interesting and will be very pleased to hear any comments and suggestions you may have for future editions.

*Simon Boardman-Weston*  
*Chairman*

BRI Asset Management plc  
BRI House  
Elm Court  
Meriden Business Park  
Coventry CV5 9RL

Registered in England & Wales  
No 727301



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BRI Asset Management plc is  
authorised and regulated by the  
Financial Services Authority.

Telephone: 01676 523550  
Fax: 01676 522799  
Email: [mail@brigroup.co.uk](mailto:mail@brigroup.co.uk)  
Website: [www.brigroup.co.uk](http://www.brigroup.co.uk)

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