

**Gilt Edge Investment Consultancy  
Campaign – Does your CIP  
compliment your practice?**

Prepared by Gilt Edge Investment Consultancy



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## **Does your CIP compliment your practice?**

The importance of a Central Investment Proposition (CIP) is now fundamental for a successful IFA practice. Since the implementation of RDR, much significance has been placed on the management of a client's investment within a Firm's advice process, and the cost implications of ongoing management.

Many advisers have expressed the view that more and more of their time is being consumed with the regulatory requirements associated with running a successful CIP. It has led to many firms outsourcing their Investment propositions to either multimanager/multi-asset funds or Discretionary Fund Managers. Both these can be quite costly, and do not actually reduce an adviser's workload. In fact, many are misguided when using a DFM or Multimanager as the requirement for ongoing evaluation and risk management is still needed. In some cases, a Firm's in house risk rating systems are not complimented by outsourcing managers and, therefore, are in conflict with a Firm's policy.

Some Firms have continued to management their own in house model portfolios and find both the compliance and regulatory aspects difficult to meet.

This is where we come in. Like a client approaching you for your specialist knowledge, as investment consultants we provide you the tools, support and assistance in achieving your investment goals. Using Gilt Edge Investment Consultancy would assist your firm with providing quality research, evaluation and implementation.

Keeping all research within your firm provides reassurance to the practice that it is your decisions for your clients, supported by good quality research from a reliable consultancy.

We believe that to be successful an IFA should do what they do best – advising.

