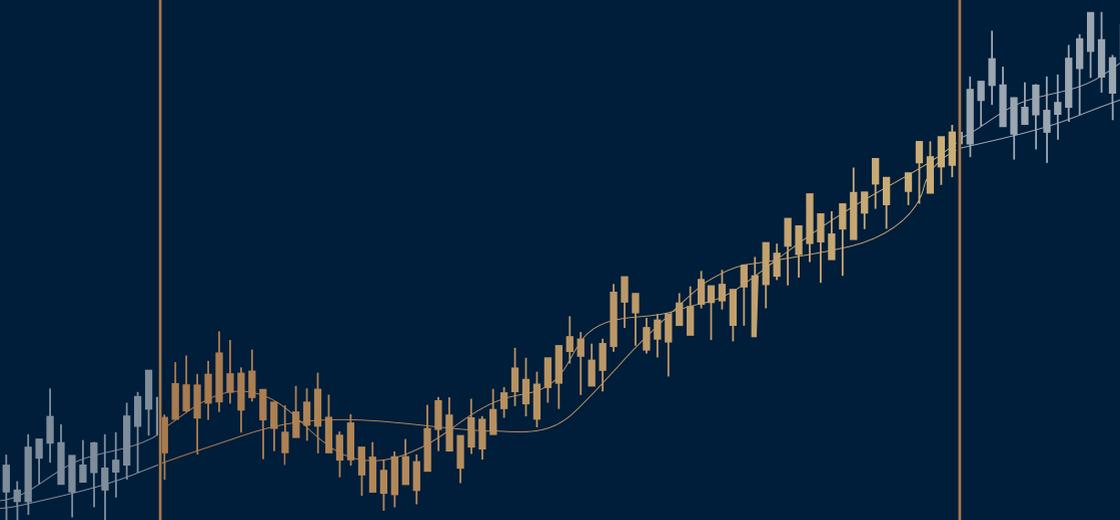


# WHITMAN

ASSET MANAGEMENT



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PRIVATE CLIENT  
INVESTMENT MANAGEMENT

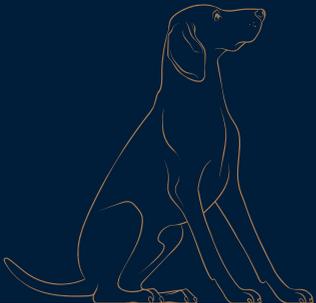
## HIGHLY FOCUSED AMBITIONS

At Whitman we manage bespoke investment portfolios with a keen eye on our clients' short, medium and long term investment goals.

In short, we always aim to help you invest in what's right for you, so that you can meet all the opportunities and challenges that come your way.

Your investment manager will work closely with you to create a suitable portfolio and will always be on hand to make adjustments to meet changes in the economy, market fluctuations and your personal needs.

By keeping an active, close and continuously focused eye on you and your needs we can help to achieve your investment ambitions.



# WHITMAN

## ASSET MANAGEMENT



Whitman Asset Management was launched in September 2018 by a group of like-minded investment professionals who saw an opportunity to build an investment business focused on client objectives and active management. Whitman is an entirely independent company, privately owned by the employees and a small number of experienced investors. As equity owners in our business and investors in our own investment strategies, we are inherently aligned to our clients.

### PRIVATE CLIENT INVESTMENT MANAGEMENT

The division looks after investments on behalf of their clients, taking a global and forward looking approach to managing portfolios. Investments can be held within personal accounts, ISAs, pensions, trusts and offshore bonds. The division has two distinct offerings:



#### DISCRETIONARY PORTFOLIO SERVICE

Whitman offers a personalised investment service for portfolios to be managed in line with individual investment objectives of a client and their risk profile. The investment manager is responsible for making the investment decisions and carrying out transactions on behalf of clients, at their own discretion.



#### EXECUTION ONLY SERVICE

Whitman offers an execution only service and will undertake transactions when specific instructions are received from clients. Individual investors will be solely responsible for the selection of the investments in which they instruct us to deal.

## OUR INVESTMENT APPROACH

For our discretionary investment clients we have a robust and detailed approach to investing assets which is underpinned by three key principles.



### 1) Client led and outcome focused

The investment objectives of the client provide the central focus to the investment manager when constructing the most suitable portfolio. We provide a range of investment solutions that address the client's specific needs and portfolios are constructed and managed in alignment with the clients' goals. Given the bespoke nature of the investment portfolio, we can incorporate historic holdings, investment restrictions and ethical concerns into the portfolio that we are managing.



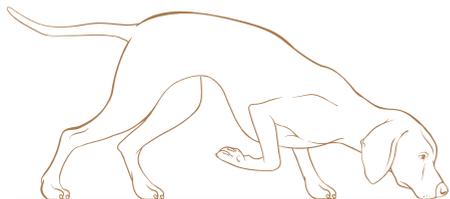
### 2) Active and pioneering

Identifying the key long-term shifts in areas such as demographics, technology, economics, climate change and consumer patterns are at the forefront of our investment research process. We firmly believe that the best way to preserve and grow client's capital is to invest actively in the countries, sectors, and companies of the future. Through combining traditional portfolio management theory with a forward-looking investment approach, we believe we can deliver attractive long-term returns.



### 3) Global and diversified

We believe that to gain access to the most compelling investment opportunities we must invest on a truly global basis. We invest across geographies and asset classes and use a combination of direct security exposure and external fund managers to give our clients the best opportunity to increase their real wealth, consistently, over the longer term.



## WHY INVEST WITH US

Client relationships are at the forefront of what we do and we recognise that to construct a portfolio and deliver a service that works, we must fully understand the specific needs and risk appetite of our clients. We also understand the importance of clear and coherent communication.

We appreciate that individual circumstances, both personal and financial, are subject to change over time. The investment strategy that the investment manager pursues on behalf of their client will evolve as circumstances for the client and their family change.

We have an experienced team of investment professionals who understand the different motivations of clients.



### Investments tailored to your objectives



### Safekeeping of your investments



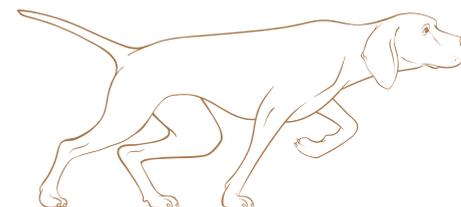
### Trusted inter-generational relationships



### Active management



### Highly experienced team



## WHAT TO DO NEXT

We would welcome the opportunity to meet with you. We want to build a long-term relationship with you and to do this we need to understand your personal and financial circumstances, investment objectives and attitude towards investment risk.

Initial conversations are the foundations for the relationship and are fundamental to ensuring that we construct the correct investment portfolios. We also encourage clients to introduce us to their other trusted advisers, such as solicitors and accountants, so that we can offer the most appropriate investment solution.

Once we have met with you and understand your requirements for your portfolio, your investment manager will create an investment proposal, incorporating any information from the initial meeting and your investment objectives.



## CONTACT

For more information, please visit our website at [www.whitman.co.uk](http://www.whitman.co.uk) or contact us on 020 37097259 or [clientenquiries@whitman.co.uk](mailto:clientenquiries@whitman.co.uk)

## WHO WE ARE



**Araminta Le Flufy**  
CHIEF EXECUTIVE  
OFFICER

Araminta has over 15 years' experience in the AIM and Smaller Company world. She spent 6 years at Whitman Howard, sitting on the Senior Management team helping to build the core business both in the public and private markets. Prior to that she was an Associate Director at Numis Securities.



**Christopher Pease**  
CHIEF INVESTMENT  
OFFICER

Christopher has over 35 years' of investment experience and joined Whitman from Sarasin & Partners where he spent 23 years. Christopher founded the Sarasin AIM Portfolio Service in 2007 and grew the strategy to c£100m in AUM. Prior to Sarasin, Christopher was with Henderson Investors where he managed UK pension funds, charity money and retail unit trusts.



**Victoria Stevenson**  
INVESTMENT  
MANAGER

Victoria joined Whitman in 2020 to help establish the Private Client Investment Management division. Victoria began her career at Quilter Cheviot in 2012 and is a Chartered Fellow of the CISI. She also holds the CISI Masters in Wealth Management.



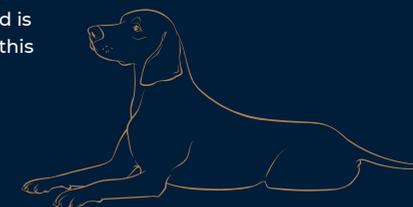
**Joshua Northrop CFA**  
FUND MANAGER

Joshua joined Whitman in 2018 from Small Cap specialist Hargreave Hale. There he worked as an Assistant Fund Manager and analyst covering small cap growth stocks across several sectors since 2013. Joshua is a Chartered Financial Analyst.



**George Henderson**  
ASSISTANT PORTFOLIO  
MANAGER

George joined the team from the sell side. Prior to this he was part of Smith & Williamson's audit team, where he initially trained. George has his IMC and is currently studying for this CFA Level 1.



# WHITMAN

ASSET MANAGEMENT

[www.whitman.co.uk](http://www.whitman.co.uk)

