Pie

Wealth with Pie

Pie Wealth

Wealth management for investors who expect more.

More hard-earned success.

We know wealth doesn't come easy. You've worked hard to gain and grow it. And we also know it's not just about money; it's about the goals you have for your life, your family and your legacy.

That's why we put everything we have into understanding you and your wider life and ambitions – and making them happen.

More personal and personalised wealth management, where long-term partnerships built on trust and advice create long-term performance.

Your needs and goals are unique. So you need someone who takes the time and makes the effort to understand you and deliver for you.

Pie Wealth is for investors who expect more from those trusted with growing and managing their wealth.

Pie Wealth

Our approach to advice

James Paterson
Head of Wealth and Client Services

► Personalised wealth management

- Pie Wealth provides ongoing investment advice on a range of products, including some that are not issued or managed by Pie Funds. Each client is unique and our recommendations are tailored to their goals, circumstances and risk profile.
- Our Wealth Advisers will guide you through the different stages of life, whether it's growing your wealth, providing an income or safeguarding your capital in retirement.
- The advice process is designed to make sure your portfolio aligns itself with your circumstances, risk profile, and your goals. Getting you invested appropriately is a key focus for us, but it doesn't stop there.
- The advice we provide is ongoing. Review and rebalancing processes are an essential part of our offering. This helps ensure the advice provided continues to meet your objectives and goals over time.
- Disclosure statements from our Wealth Advisors are available on request, free of charge.

► What's included

- A written Statement of Advice on how to achieve your financial goals.
- Access to Pie Funds and other investment products.
- Personalised investment advice and regular meetings with your Wealth Adviser.
- An online portfolio platform to view your investments at any time.
- Full administration and independent custody of your holdings (i.e. your money is not held with Pie directly).
- Monthly fund updates.
- Semi-annual reports and annual tax report.
- Invitations to client events.

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