Customised Investment Solutions

What is Customised Investment Solutions?

Customised Investment Solutions is a personalised investment service that is tailored to a wholesale client's investment policies and objectives. It offers integrated portfolio management, including core investment management, custody, and reporting services.

Our bespoke portfolio construction approach is built on world-class local and international research and partnerships, which when combined with our independent manager selection process and strategic partnerships offers clients opportunities in both public and private markets. We have a commitment to constructing investment solutions that align with clients' values and with Responsible Investment objectives and other needs and requirements.

Customised Investment Solutions clients have access to a highly experienced, local and directly accountable Investment Management team supported by our Portfolio Advisory Group and senior members of Forsyth Barr's research and management group. With a focused local team approach, backed by the largest in-house research team in New Zealand, and supported by strong international research and broking affiliations, we deliver direct accountability for (and transparency of) investment outcomes.

About Forsyth Barr

Forsyth Barr was established in Dunedin in 1936. Today, it is one of the largest investment management firms in New Zealand. Our reputation is founded on integrity, high standards of service and outstanding investment advice. The firm is 100% privately and NZ owned and employs over 450 investment professionals located across 24 offices nationwide.

We are a leading participant in the NZX equity and debt markets, providing advice and direct access for trading and investing in a range of instruments, including New Zealand, Australian, and international equities, listed property securities, and global and Australasian debt securities.

Forsyth Barr maintains a network of international affiliates to provide financial market commentary and world-class research coverage across the major global markets. These include UBS, Citi, Investec, BCA, TS Lombard, and a variety of fund managers.

We are a full service financial services firm including wealth management, investing banking, funds management and institutional broking with clients throughout New Zealand and around the globe.

NZX Foundation Firm
NZX Firm

Financial Markets Authority
Licensed Financial Advice Provider

Strategic Alliance
Barrenjoey

International
Affiliations

- Investec
- MST
- BCA Research
- UBS
- Citi
- TS Lombard
- Ord Minnett

$16B
MANAGED INVESTMENT ACCOUNTS

$26B
CLIENT ASSETS

FUNDS UNDER MANAGEMENT
$942M
256 CLIENTS WHO ARE:
PRIVATE FOUNDATIONS
CHARITABLE TRUSTS
FAITH BASED

Forsyth Barr
in the Community

- $200,000 donated to Diabetes NZ
- Recommitted to another 10 year naming rights agreement with Forsyth Barr Stadium
- Partnering with Live Ocean Foundation for a multi-year commitment
- Foundation supporter of the "A Children's Christmas" initiative
- Financial support to the New Zealand Young Enterprise Trust and the Business Hall of Fame Awards
- Sponsorship of the Gut Cancer Foundation fundraising gala event
- Financial support for Halberg Foundation and secondary school leaders programme

The Forsyth Barr Philosophy is summarised by six core principles:

01 OUR CLIENTS' BEST INTERESTS COME FIRST

Our understanding of your goals, and what will create success for you, drives everything we do.

02 WE DELIVER IMPARTIAL AND INFORMED ADVICE

As a New Zealand-owned business, we are entirely independent in the advice we deliver and the specific investments that we recommend.

03 WE ARE MOTIVATED TO DELIVER

Delivering outstanding service and performance is what enables us to build long-term trusted relationships.

04 WE OPERATE TO BEST PRACTICE STANDARDS

We are committed to delivering to industry best practice and actively participate in many industry bodies.

05 WE OFFER SERVICES THAT FIT

Our full range of investment services are designed to fit your unique wealth management needs.

06 WE DELIVER GLOBAL OPPORTUNITY

We partner with leading international institutions to ensure access to global connections, research and opportunities.

What We Do

A critical component of our Customised Investment Solutions service is to develop (or review) and agree a unique investment mandate with each client.

This mandate is formalised through the Statement of Investment Policies and Objectives (SIPO), including consideration of:

- investing time horizon
- return objectives, (absolute or inflation adjusted)
- distribution requirements, (and whether mandatory or discretionary)
- liquidity needs
- ability to incur and accept short-term volatility, (unrealised capital losses)
- socially responsible investing (SRI) considerations
- appetite for alternative investments

Following SIPO agreement, we will provide either a:

1) Portfolio Advisory & Management service
Initial establishment and ongoing discretionary portfolio management (on a reasonable endeavours basis), in accordance with the requirements and investment parameters of the client's agreed Statement of Investment Policy & Objectives (SIPO),

2) Portfolio Advisory service
Initial and ongoing portfolio advice and recommendations to acquire or dispose of securities in order to meet agreed SIPO requirements.