

The last twelve months have been an investment rollercoaster.

Professional Trustees are under a clear duty to ensure that under S4(2) of the Trustee Act 2000, Trustee investments are kept properly reviewed.

We understand that many financial advisers and stockbrokers advising on Trustee investments have simply gone to ground in the last year, preferring to keep their heads down, blaming the markets and not relishing the prospect of difficult review meetings with Trustees.

Is it now time to take stock? Maybe some green shoots are evident, but perhaps of greater importance is that much has been learned over the last twelve months, particularly in relation to managing investment risk. It seems that it has taken the credit crunch to sort the wheat from the chaff.

In response, we are pleased to offer a no-obligation Trustee Investment Review Service. The service ensures that your Trustee investment strategies continue to be suitable and appropriate.

The service is simple and free. We offer both a Trustee Investment Suitability Report, which looks at the existing investments to ensure that they are appropriate and in addition, an updated Trustee Policy Statement in accordance with S15 of the Trustee Act 2000.

The Trustee Review Service is also suitable for Property and Affairs Deputies acting on behalf of Protected Individuals, in accordance with the Mental Capacity Act 2005.

The Trust Review Service at a glance:

- Step 1:** We gather the necessary information and analyse the Trust's objectives. This includes an investment risk profile exercise.
- Step 2:** We consider the existing portfolio and report to the trustees on the continued suitability of the investments.
- Step 3:** We update the Trustee Policy Statement in accordance with S15 of the Trustee Act 2000

We believe that the Trust Review Service enables Professional Trustees to gain comfort in these unprecedented times. Whether acting for families, personal injury victims or charities our impartial Trust Review Service ensures that Trust investment portfolios are scrutinised and compliant.

For further details, please contact either Nicholas Martin or Nick Leech at Nestor Partnership or visit: www.nestorpartnership.co.uk for information about our services.

IMPORTANT NOTICE:

Nestor Partnership is authorised and regulated by the Financial Services Authority.

Nestor Partnership is detailed on the FSA register (www.fsa.gov.uk) under reference 418851. Nestor Partnership is a Limited Liability Partnership registered in England & Wales No OC310611.

A full list of partners is available at our offices for inspection. We take great care to ensure that Nestor Partnership complies fully with the

guidelines set by the regulatory bodies within the Financial Services industry. No information contained on this publication should be construed as an offer or invitation to invest.

The Financial Services Authority does not regulate deposit accounts, Personal Injury Trusts, Periodical Payment advice, Taxation and Trust advice.