

deVere Investment

Personalised
DFM Service
for Lump Sum Clients

Open Architecture
Investment Management for your
Lump Sum Investments

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Introduction

At deVere Investment, we understand the importance of effective investment management for lump sum investments. Our Discretionary Fund Management (DFM) service is designed to meet the unique needs of clients seeking comprehensive and customised solutions. With an open architecture model, our DFM service involves collaboration between the client, their local investment consultant, and our Mauritius-based advisors.



This document serves as a comprehensive guide to our DFM service for lump sum investments. It outlines the benefits of choosing deVere Investment as your DFM provider and explains the open architecture investment management approach, providing insights into our key features and the process of getting started.

deVere Investment is a renowned global financial advisory firm that specialises in wealth management and investment services. With our extensive experience and a wide network of experts, we are committed to delivering tailored solutions that help our clients achieve their financial goals.

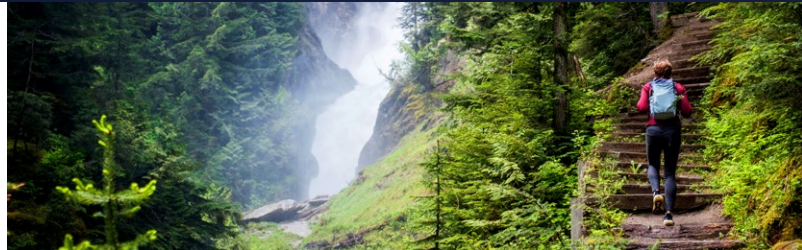
Understanding the deVere Investment DFM Service



What is DFM?

Discretionary Fund Management (DFM) is an investment service in which a professional investment manager makes investment decisions on behalf of the client. Our DFM service for lump sum investments allows clients to leverage our expertise and experience in managing their investment portfolios while also actively participating in the decision-making process.

Benefits of DFM for Lump Sum Investments



Professional Expertise: Our experienced investment managers analyse market trends and make informed investment decisions to optimise returns.

Customisation: We tailor investment portfolios to align with clients' unique investment goals, risk tolerance, and preferences.

Open Architecture: The open architecture model allows for collaboration with local investment consultants and the involvement of our Mauritius-based advisors, providing a diverse range of investment options.

Transparency: We ensure transparent reporting and effective communication, keeping clients informed about their investment performance and any changes made to their portfolios.

Our Approach to DFM Services

At deVere Investment, we believe in a client-centric approach to DFM services. We collaborate closely with clients, their local investment consultants, and our Mauritius-based advisors to create personalised investment strategies. This collaborative approach ensures that clients have access to a wide range of investment options and benefit from our collective expertise.

Open Architecture Investment Management

Exploring the Open Architecture Model

Our open architecture investment management approach allows clients to benefit from a broad range of investment opportunities. We collaborate with reputable asset managers and financial institutions worldwide, enabling us to provide access to diverse asset classes, investment styles, and geographic regions.

Collaboration with Local Investment Consultants

We work in partnership with clients' local investment consultants, respecting their expertise and knowledge of the local market. Through this collaboration, we combine global investment insights with local insights, optimising the investment portfolio to achieve the best possible outcomes for our clients.

Involvement of Mauritius-Based Advisors

Our Mauritius-based advisors play a crucial role in the DFM service, providing guidance, expertise, and oversight. They work closely with clients and their local investment consultants to ensure that investment decisions align with the client's goals and risk appetite while adhering to regulatory requirements and best practices.



Key Features of the deVere Investment DFM Service



Comprehensive Investment Solutions

Our DFM service offers comprehensive investment solutions, covering a wide range of asset classes, including equities, fixed income, alternative investments, and more. We provide access to a diverse selection of investment options, ensuring that portfolios are well-positioned to capture potential opportunities and manage risk effectively.



Expert Investment Management

Our team of skilled investment managers possesses extensive knowledge and experience in global financial markets. They actively manage portfolios, making informed investment decisions based on rigorous analysis, market research, and a deep understanding of the client's goals and risk profiles.



Customised Investment Portfolios

We understand that each client's financial goals and risk tolerance are unique. Our investment managers work closely with clients and their local investment consultants to design customised investment portfolios that align with their specific requirements, preferences, and risk appetite.



Transparent Reporting and Communication

We believe in maintaining transparency with our clients. Our reporting includes clear and comprehensive information on investment performance, fees, and any changes made to the investment portfolio. We provide regular updates and effective communication channels to keep clients informed and engaged in their investment journey.





Why Choose deVere Investment for DFM Services?

Global Expertise and Network

With our global presence and a network of experts, deVere Investment offers extensive expertise in managing lump sum investments across different regions and asset classes. We leverage our global knowledge to identify opportunities and implement strategies that align with our client's goals.

Client-Centric Approach

At deVere Investment, we prioritise understanding our client's unique needs and goals. Our client-centric approach ensures that investment strategies are tailored to individual requirements, risk tolerance, and preferences. We strive to build long-term relationships with our clients, providing ongoing support and guidance throughout their investment journey.



Open Architecture Model

Our open architecture investment management model provides clients with access to a diverse range of investment options. We collaborate with local investment consultants and leverage our Mauritius-based advisors' expertise to deliver comprehensive and flexible investment solutions.

Industry Recognition

deVere Investment has been recognised in the industry for its excellence in wealth management and investment services. These accolades validate our commitment to delivering high-quality solutions and reinforce the trust our clients place in us.

Getting Started with the deVere Investment DFM Service

Initial Consultation and Goal Setting

We begin our DFM service by conducting an initial consultation with each client. This consultation helps us understand your investment goals, risk tolerance, and preferences. We work closely with you and your local investment consultant to define your investment objectives and create a tailored investment plan.

Collaboration with Local Investment Consultant

We value the expertise of your local investment consultant and involve them in the investment decision-making process. Our collaborative approach ensures that your investment portfolio reflects all parties' combined knowledge and insights.



Involvement of Mauritius-Based Advisor

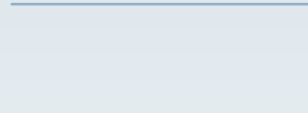
Our Mauritius-based advisors play an integral role in managing your investment portfolio. They provide guidance and oversight, ensuring that investment decisions align with your goals, risk appetite, and regulatory requirements.



Frequently Asked Questions (FAQs)

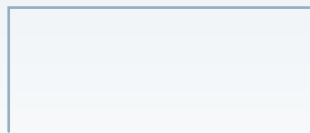
What types of investments are included in the open architecture model?

Our open architecture model covers a wide range of investments, including equities, fixed income, alternative investments, REITs, and more. The specific investments included in your portfolio will be based on your goals, risk profile, and preferences.



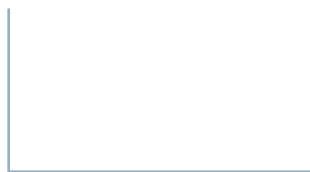
How are investment decisions made within the DFM service?

Investment decisions are made based on thorough analysis, market research, and collaboration between our investment managers, your local investment consultant, and our Mauritius-based advisors. The decisions aim to align with your investment goals, risk tolerance, and prevailing market conditions.



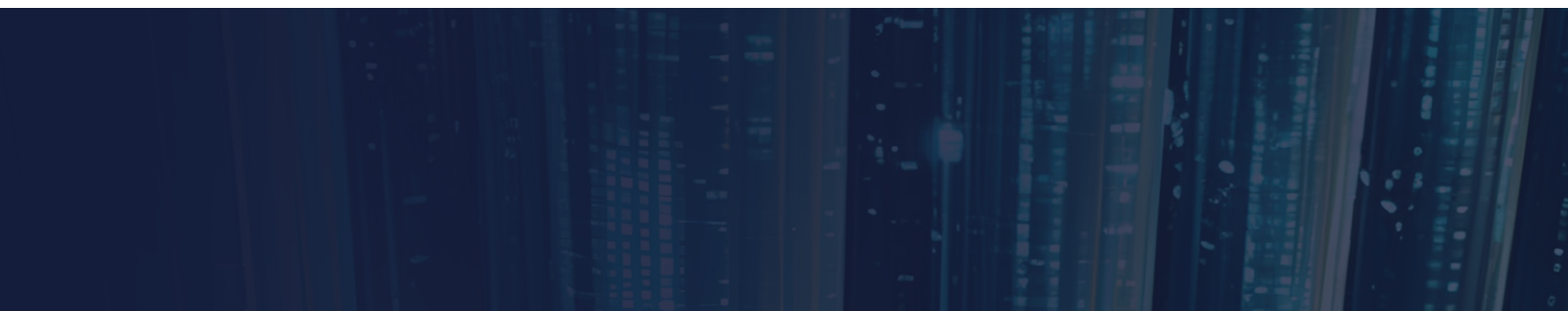
Can I customise my investment portfolio based on my preferences and risk tolerance?

Absolutely. We understand that your investment preferences and risk tolerance may evolve over time. Our investment managers work closely with you to ensure that your portfolio is tailored to your specific requirements, preferences, and risk appetite.



How often will I receive updates on my investment performance?

We provide regular updates on your investment performance, typically on a quarterly basis. Additionally, our team is available to address any inquiries or concerns you may have regarding your investments throughout the year.






Conclusion

Summary of the deVere Investment **DFM** Service

deVere Investment offers a comprehensive DFM service for lump sum investments. Our open architecture investment management approach, involving collaboration with local investment consultants and our Mauritius-based advisors, ensure customised investment portfolios, expert management, transparency, and a client-centric experience.



Personalised **DFM** Service for Lump Sum Clients

To learn more about our **DFM service**
or to speak with one of our investment
advisors, please contact us at:



+230 460 0046

dfmdealing@devere-investment.com

www.devere-investment.com

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