MURRAY ASSET MANAGEMENT

Murray Asset Management is an independent investment management and financial planning firm.

Our business is based on trust, experience and quality of service and we value the long term relationships we establish with our clients, who include private investors, trustees, charities and small pension funds.

In a financial world increasingly dominated by large and often impersonal organisations, we are an established yet relatively small business. This enables us to provide a responsive service where individual requirements are matched with tailor-made independent investment solutions. Our aim throughout the investment process is to manage and grow your wealth over the longer term through active portfolio management.

We also provide advice on all aspects of financial planning, including family protection and saving for retirement.

Investment Management Services

With over 100 years' experience in managing the wealth of private individuals, trusts and families, our investment management service puts the interest of our clients first, taking account of their attitude towards risk, tax status, capital and income requirements, future needs and any preference for social and ethical investments.

As clients discuss their investment aspirations and objectives, we remain focused on understanding their needs, devising appropriate investment strategies and clearly communicating investment proposals that will encompass the main investment asset classes.

"What should I expect from Murray Asset Management?"
Our investment management service is flexible and can be tailored to suit specific requirements. However, our main focus is on providing a fully comprehensive discretionary management service to our range of clients, including private individuals, charities, pension funds, trustees and executors.

In addition to being attentive and responsive to client requests, our investment professionals are involved in every aspect of the investment process, from stock selection to asset allocation. With a tightly knit team, this allows clients to speak directly with their investment manager or colleague to discuss pertinent issues, Murray Asset Management's investment views and specific portfolio matters and requests.

Clients also gain access to a well defined investment process, designed to underpin our commitment to deliver attractive risk adjusted returns.

Our systems look to identify individual equities and collective investment vehicles that offer both value and robust returns over the relevant investment horizon. Additionally, drawing on years of experience and long established relationships, our investment professionals gain access to the latest thinking, research and fund management professionals across the UK and beyond.

With clients' interests at the centre of everything we do, clear, simple and informative communication and reporting is critical to our investment management service. Our new client reporting package has been developed to provide even greater clarity and understanding of a portfolio's investment performance against a range of benchmarks.

Moreover, the performance of client portfolios is closely monitored within a review process, in line with a strong ethos of compliance in order to provide quality assurance.

"How do I become a client?"
Firstly, you will need to discuss your investment objectives with one of our investment professionals. During this, we would ask for you to complete an initial client profile and sign an investment management agreement. In order to satisfy Anti Money Laundering regulations, we would ask to see documents such as your passport or driving license. You may also be asked to complete Transfer forms, enabling us to electronically hold on your behalf, your investments within our nominee companies.

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Investment Management Services

Benefits of using our Investment Management Services

Discretionary Management – a fully comprehensive service designed to relieve the burden of running an investment portfolio, selecting shares, arranging transactions, monitoring capital gains tax positions and handling associated paperwork and administration.

Murray Asset Management is a recognised ISA manager and can therefore manage ISAs on behalf of clients.

Additional Services

We provide clients with detailed tax information, featuring a breakdown of all;

- income received from the portfolio
- gains or losses on any sales for the tax year
- list of purchases and sales of investments

Finally, we offer a range of wealth management services, including tax and trust advice and financial planning.

These services are all designed to provide you with confidence and reassurance that your assets are being managed to achieve your investment objectives and to secure your wealth.

Please contact us for further details, an application form or to arrange a meeting.

If you would like any further details on the services we offer, please do not hesitate to contact

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