



## Warwick Butchart Investment Process

### Investment Process

#### **1 In-depth discussions and meetings with each client**

Identify objectives, ascertain the real risk profile using the latest techniques (such as behavioural analysis & stochastic modelling), agree asset allocation and diversification levels.

#### **2 Quantitative Analysis**

Detailed analysis including Reuters/Lipper/Hindsight fund intelligence, database & graphics system - and other IT resources.

#### **3 Qualitative Research**

Numerous in-depth interviews, meetings and discussions with Fund Managers, Asset.TV research, investment media, forums, web tools.

#### **4 Cost savings, service, and support**

IT driven – contemporary systems for administration, service & support. Discounted investment costs, fee basis and/or commission offset. Fund Supermarket consolidation service to cut client costs and simplify client paperwork.

#### **5 Personal Meetings**

Independent specialist advice & regular scheduled reviews.

**Warwick Butchart Associates Limited**  
45 Portland Street, Cheltenham, Glos, GL52 2NX  
Tel: 01242 584144. Fax: 01242 226393  
[Email: help@warwickbutchart.co.uk](mailto:help@warwickbutchart.co.uk)  
[Web: www.warwickbutchart.co.uk](http://www.warwickbutchart.co.uk)

Authorised and Regulated by the Financial Services Authority