



The WAY Group

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For immediate distribution

THE WAY GROUP announces the launch of new subsidiary, WAY Investment Managers Limited, to take over the management of the successful WAY Global Portfolio range of funds. New initiative part of the continuing development of WAY Group as a leading investment manager

Leading fund manager and inheritance tax planning specialist The WAY Group today confirmed it is embarking on a new 'core and satellite' approach to establishing itself as a new breed of investment house offering comprehensive fund strategies for its IFA clients.

"Until now we have relied on external advisors to manage our various funds but we have now reached sufficient size and maturity to set out on a more ambitious approach which blends our own expertise on portfolio style funds with specialist external skills delivering investment in targeted areas such as Asia and Gold" said The WAY Group chairman Paul Wilcox.

"For many years we have been under pressure from some of our IFA clients to take the management of our flagship funds in-house."

“At the same time it has also become increasingly clear that we should be offering our clients a range of specialist growth funds, focusing on the major investment trends of the next 10 years, which can be used as a supplement to personalise our existing and successful global portfolio-style funds.”

“The result is a twin strategy going forward whereby we will progressively manage our global portfolio-style funds in-house whilst also launching a range of high growth specialist funds to supplement and personalise each investors ‘portfolio’ according to their own preferences.”

“It is with some regret that we will be moving away from Fundquest, with whom we have had a very harmonious 8 year relationship. Without any doubt Fundquest and, in particular Paul Kim, has been a huge contributor to the success of our fund offerings in recent years.”

WAY Investment Managers will benefit from the skills and experience of an advisory ‘Star Chamber’ of external managers, many of whom will also manage specialist funds for WAY. Regular input from the Star Chamber will supplement the skills of the in-house portfolio management team, which in future will be responsible for asset allocation and fund selection for the Global Portfolio Funds.

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Editor's notes

Incorporated in 1996, The WAY Group is a privately owned financial services group.

The founders of the company include ex-independent financial advisers who specialised in offering portfolio management and related services to private and corporate investors.

For further information about The WAY Group products and services please call 01202 855856, or visit www.waygroup.co.uk