The iGuard Investment Committee

iguard ... a new way of thinking

The iGuard Investment Committee consists of people from a range of backgrounds, as we believe that a multi-discipline approach provides greater depth of understanding. Our investment professionals come from both the institutional and retail parts of the industry, ensuring that your clients benefit from detailed investment analysis alongside a genuine understanding of the needs of the retail investor. This unique combination of skills and experience allows us to deliver a proposition that is entirely focused on investor needs.

The committee meets every month to review the progress of the portfolios and developments in the global economy. However, we will adjust the positioning of our portfolios at any point in between if we believe that circumstances have changed significantly.

Ari Towli, Portfolio Manager, Smart[im]

Ari has over 19 years' experience in the area of multi-asset, multi-manager investing. He has worked at Singer & Friedlander, Quilter & Co., Rothschilds, Gartmore and more recently North Investment Partners Ltd. where he was responsible for fund selection and the management of North's multi-asset portfolios and funds. Whilst at Gartmore, Ari developed the risk tools that were critical to the construction and management of the Gartmore multi-manager funds and was instrumental in the design and development of Gartmore's Multi-Manager Absolute Return Fund and, later, North's range of risk-graded multi-asset portfolios. Alongside Tactical Asset Allocation and fund selection, his role on the Smart[im] Investment Committee is to provide technical and quantitative analysis of the portfolios, focusing in particular on risk.

Nick Stanhope, Portfolio Manager, Smart[im]

Nick has over 13 years' experience in the investment management industry and specialises in the area of multi-asset, multi-manager investing. Nick has worked for Abbey, Legal & General, Chiswell Associates, Cazenove and more recently North Investment Partners Ltd. where he spent over six years as a senior fund manager responsible for fund selection and the management of all North's multi-asset funds and their range of risk-graded multi-asset portfolios. Alongside Tactical Asset Allocation and fund selection, his role on the Smart[im] Investment Committee is to provide assessment of the prevailing macro views in the market place, along with market momentum.

Andrew Shaw, Head of Research & Strategic Planning, Phoenix Wealth Management Ltd. and Phoenix Temple Wealth Management Ltd.

Andrew has 25 years' experience in financial services, many spent as an adviser specialising in the more technical aspects of financial planning, and has been a Chartered Financial Planner for nearly 10 years. He became Head of Research at Phoenix Wealth Management Ltd in 2005, where he heads an Investment Team with a strong investment track record. Alongside Tactical Asset Allocation and fund selection, his role on the Smart[im] Investment Committee is to provide insight into the needs of individual investors. He also oversees the way in which we communicate with our investors and ensures that the information we provide is clear, concise and relevant.

Henry Kingsbury, Product Development Manager, Praemium (UK) Ltd.

After obtaining a BA in Economics from Durham University, Henry joined Praemium in 2006, initially in a marketing capacity but more recently focusing on product development, as well as the administration and reporting of investments. His role on the Smart[im] Investment Committee is threefold: to use his in depth understanding of the Praemium platform to advise on how best to make changes to the portfolios i.e. how best to buy and sell funds, to perform a Committee Secretary role and minute the meetings and to co-ordinate any investor communications arising from the meetings.

Jennifer Dackombe, Investment Analyst, Phoenix Wealth Management Ltd.

Jennifer obtained her BSc (Econ) in Geography and Business from Queen Mary University of London and completed a Graduate Diploma in Law before deciding that financial services was where her future lay. She joined Phoenix Wealth Management Ltd in 2010 as an administrator and, because of her drive and natural talent, quickly worked her way up to Investment Analyst. She is a member of the investment team at Phoenix Wealth Management Ltd, and, alongside Tactical Asset Allocation and fund selection, her role on the Smart[im] Investment Committee is to provide quantitative analysis on the funds under consideration for inclusion within the portfolios.

William Brewis, Head of Compliance & Legal Services – UK, Praemium (UK) Ltd.

After qualifying as a solicitor in 1993, William worked as a Corporate Lawyer for two international UK law firms, Linklaters and Wragge & Co.. During this period he worked with a range of different financial services organisations, including investment funds, advisers and insurers. At Wragge and Co. he set up and led their financial services team which, amongst other areas, dealt with regulatory & Compliance issues.

William joined Praemium as UK Head of Legal Services in September 2008 and his role on the Smart[im] Investment Committee is to provide Compliance and legal oversight of the portfolios from both a UK and international perspective.