

Newsletter



Q1 2010 Edition 4

Established 1999

For People Who Care

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For more detailed information about Avalon and our products, visit our website.

You can also download all product documents.

www.avaloninvestment.com

Introduction

Welcome to our quarterly newsletter which keeps you up-to-date with market developments and lets you know how we are evolving to help you.

Firstly, let me tell you about **Platforum**. They are a refreshing new media and research enterprise focusing on wraps within wealth management. Many of our members have enthused about them and we warmly welcome new IFAs who have discovered Avalon via this medium. Please see our News section for details.

Now is the time to get ready for the **new tax year** and ensure your clients make the most of the increase in the annual allowance to **£10,200**. We can produce bespoke brochures and mailshots so that you can offer your clients a badged/white label ISA. Just call us for details and we'll be happy to help.

Finally, I am pleased to announce that we are developing the functionality to **pay commission via direct credit** which we hope will cut down on your administration further. To take advantage of this new initiative, please send your bank details to our Commissions Department as soon as possible.

I hope you enjoy reading this edition of the Newsletter and we would be pleased to hear of any other information you would like to see included in future editions.

Thank you,

Harry Kerr, Director

Fund Focus

We have **negotiated substantial discounts** with Thames River Capital who are currently offering their range of Multi-Manager funds to us at **no initial charge**. Thames River is highly regarded by other Fund Managers and at the forefront of a new breed of investment boutiques. The assets have been carefully selected by one of the most successful multi-manager teams to provide a diversified range of Multi-Capital funds. See the Avalon website for videos and comments.



Buy your Fidelity China Special Situations Fund (ISA) here – this fund launches in March 2010 and will be available at Avalon to buy immediately following launch. Anthony Bolton's eagerly anticipated China Fund with Fidelity should be of interest to new and existing China investors.

MFM Glendevon King has just **launched a Global Bond Fund**. This fund is a UK OEIC which will invest in a range of bonds traded on global markets, seeking income and capital growth over the medium term. MFM Glendevon King is an independent asset manager whose Authorised Corporate Director is Marlborough Fund Managers. The fund will aim to outperform the IMA Global Bond Sector average and is available on the Avalon Platform.

To get up to date information on the latest fund launches, please check our Market Commentary section at www.avaloninvestment.com

Contact Us

We will be delighted to answer any questions you may have.

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Avalon News

Platform have piloted an IFA-only platform reviews/ratings page which they have built in response to IFAs asking them what their peers think of platforms. They thought it would be useful for advisers to see unbiased feedback coming from fellow users. **Platform would like IFAs to submit reviews** and rate those platforms you use or have seen at first-hand. It's a bit like Amazon where you can rate a book and other users get to see what people think about it.

The platforms section of the site is strictly for IFAs only. Any specific comments used will always be non-attributable and Platform will police those who access the site very strictly. They don't want the platforms or providers in there as they think this would discourage free and open discussion.

Registration to the site is free and special permission to view the platform ratings service are granted to IFAs on request. Their website address is www.theplatform.com

THE PLATFORM

Our Products

The range of open choice products available to you can be found on our website. Each quarter we would like to highlight one particular product, this quarter it is the **Monthly Income Portfolio**. This is a discretionary portfolio designed to produce a growing income over the long term with a regular monthly income. It invests in a range of top quality UK Equity income funds and is currently yielding over 5%. The Monthly Income Portfolio is an ideal solution for those investors seeking a rising income and is available through Avalon's highly flexible and transparent ISA and Portfolio products.

The Monthly Income Portfolio is actively managed so it will *free up your time*. You won't need to regularly monitor your client's investments as it will be done for you by Minerva Fund Managers.

Details are available to download from our website at www.avaloninvestment.com

Future Issues

Building upon our investment innovation programme announced in our last newsletter, we have forged links with a number of premium boutique firms (and some larger ones too) to help communicate ideas to our IFAs. These will start to appear on our website and allow you to visit micro-sites of these fund groups such as Thames River Capital (mentioned), the Matrix Group, Octopus, FundQuest and others.

Citywire - Harry attended their 5th New Model Adviser Conference on January 15th/16th. This highlighted the essential role that Open Architecture wraps will play in "RDR 2012" and the enhanced facilitation of different investment models e.g. discretionary management, both in-house and outsourced, fund of funds, core satellite advisory portfolios and the ascending ETFs.

Watch your investment grow and invest in trees! We are currently investigating the prospect of buying into Ethical Forestry. Timber is one of the most consistently high performing commodities of the last 100 years and, even better, it is now a socially responsible investment.



Next newsletter.... tax driven schemes e.g. Venture Capital Trusts and Enterprise Investment Schemes.

For further information see our website www.avaloninvestment.com or contact us on 01666 501710 – enquiries@avaloninvestment.com. We will be delighted to answer any questions you may have.