

**Introducing**  
a financial services  
business built with  
passion and integrity.  
We are **Mattioli Woods**



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## Welcome to Mattioli Woods

We enjoy delivering great outcomes for our clients in the areas of wealth management, employee benefits, asset management, property fund management and professional adviser services.

*"We have a soul. We have a culture. We have values. And our clients are absolutely at our core."*

**Ian Mattioli MBE**  
Chief Executive Officer  
Mattioli Woods plc

From the young entrepreneur in the early stages of their career, to the retired property developer couple with a combined wealth of more than £20 million, Mattioli Woods is here to help and support clients in protecting and growing their finances to meet their aims and ambitions.

The same applies to the directors and managers of companies – whether they sit at the helm of an internationally head-quartered business opening offices in the UK or a developed company with offices across multiple sites, we support their individual requirements as well as helping them create the right benefits package for their employees.

Whatever the situation, we provide our clients with a consistent all-embracing approach, designed to develop a clear strategy supported by sound investment initiatives and a long-term perspective.

Employing over 600 people, Mattioli Woods is an AIM-listed company forging ahead with our plans for growth and expansion. We will always be proud of the fact our clients – individual or corporate – are the very reason we do what we do.

**We look forward to working with you.**

## Our story

An AIM-listed company that started life 30 years ago in a converted garage in Leicester, Mattioli Woods now employs over 600 people at locations across the UK.

We are a leader in the provision of self-invested personal pension and small self-administered pension scheme arrangements, both of which are central to our clients' life-planning strategies.

This expertise has continued to grow into full wealth management, cemented by the addition of our employee benefits division.

We grow both organically and by acquisition and are delighted to have welcomed excellent like-minded companies into the group – businesses that share our value of providing the highest levels of personal service.

Today, as back then, the overriding passion is to deliver the best possible outcomes for the people who trust us to look after their wealth. It is a responsibility we feel privileged to shoulder, whether that be through pensions, investments, healthcare or innovations like our Structured Products Fund.



Mattioli Woods is built with expertise and integrity, and delivered with passion.

WE AIM TO RAISE MORE THAN

**£150,000**

TO HELP FUND VITAL RESEARCH WORK FOR ALZHEIMER'S RESEARCH UK

We have our own team of charity champions across all our locations who meet regularly to discuss and agree community and social activity.

We are proud sponsors of Leicester Tigers Rugby Club, and in 2020 we strengthened our support for the club with a new five-year deal that included the stadium being rebranded to Mattioli Woods Welford Road. Our support of world record-holding wheelchair racer Sammi Kinghorn, whose career we have backed from its infancy is one we are particularly passionate about.

In 2019, we launched a new national partnership with Alzheimer's Research UK focused on boosting research, improving treatments and raising awareness about dementia. As well as charity involvement, we take seriously our moral and social responsibilities, particularly in the communities we serve.

**We have a long-standing commitment to supporting our staff in engaging with their local communities and charities.**



## Our business

We are an award-winning financial services group.

The key difference between us and many of our larger competitors is our hands-on, tailored approach to financial advice.

## Our marketplace

Our clients benefit from the support of the Mattioli Woods group while receiving a local, personalised service.

Providing integrated services for individuals, we embrace pension consultancy that covers a strong specialism in both self-invested personal and small self-administered pension schemes, as well as personal investment and estate planning.

For corporate clients, we provide a comprehensive range of employee benefit services, founded on a strong culture of client care.

We pride ourselves in building long-term relationships to provide trusted advice, high standards and a personalised delivery.

TAKING CARE OF  
**£15 BILLION**  
OF OUR CLIENTS' ASSETS

There is a genuine focus on providing the highest level of personal advice and maintaining close relationships with all clients, which has led to high levels of satisfaction, retention and referrals.



Over the years, a number of like-minded businesses have joined the group to help us expand our service offering and increase our footprint. In 2020, for example, we welcomed Hurley Partners Limited, whose values closely align ours.



## Our clients come first

We deliver great outcomes for our clients, and we enjoy doing it.

Our clients come from many walks of life – from professionals and owner-managers to senior executives and retirees. And when it comes to our employee benefits division, we look after small to medium business through to large international companies.

Our clients expect a high-quality service and expert, innovative and proactive advice, bespoke to their circumstances and delivered personally. Our clients are confident in the advice we give and know our strategies will be administered quickly and efficiently. Communication is central to everything we do – so we will make sure you understand and feel comfortable with what we are doing, when we are doing it and why.



# Our services

## Designed around you.

### Wealth management

Using a range of pensions, investments, funds and financial planning techniques to maximise the value of your assets, Mattioli Woods can help you manage your finances to ensure they are meeting your business and personal wealth needs both now and in the future.

#### Our core services includes:

- pensions – SIPP, SSAS, trustee services
- investments – Structured Products Fund, ISAs, OEICs
- portfolio management – active oversight of investments by our in-house team
- financial planning – wealth building, trust planning, IHT, exit planning, executive financial planning
- property – real estate investment trust (REIT), syndicated property, property insurance
- protection – life assurance, medical insurance, critical illness, income protection, shareholder protection, key person protection

From our heritage as a leading pensions adviser, our impressive growth and development means we are now one of the premier financial services companies in the UK providing a broad range of wealth management and investment expertise.

### Asset management

Asset management at Mattioli Woods exists to help you invest your finances using a variety of traditional and alternative product offerings. We provide a clear, robust and effective all-embracing approach centred around disciplined flexibility.

As a client, you will have access to the following allocation options, helping you adopt a combination that suits your investment strategy:

- multi-asset funds and portfolios
- property
- structured products
- tax strategies

Designed to develop a clear strategy for your financial plans, our process is supported by sound investment initiatives and a long-term perspective.

### Employee benefits

We recognise the importance of supporting our clients in their journey to design and deliver a benefits package that will motivate and reward employees. Our team of experienced consultants has the skill and knowledge to help you design a benefit structure that is rewarding, compliant and competitive.

Our key employee benefit services include:

- flexible benefits
- pensions
- international services
- financial education
- health and wellbeing
- executive financial counselling

### Property fund management

At Mattioli Woods, we believe commercial property has long been an important component of a diversified investment portfolio.

Custodian Capital is the property investment management division of Mattioli Woods, which has three key strands to its business. These are:

- as investment manager to Custodian REIT, which aims to be the real estate investment trust of choice for private and institutional investors seeking high and stable dividends from well-diversified UK real estate
- establishing and managing asset-backed private equity investment opportunities for the high net worth and sophisticated investor clients of Mattioli Woods
- establishing and operating syndicated property structures

We also have the Private Investors Club, which provides asset-backed private equity investments targeting a varied portfolio of higher-yielding opportunities.

### Professional adviser services

Our professional adviser services are designed to help other financial advisers provide pension and pension-planning expertise to their clients, bridging the gap of knowledge in this highly technical subject.

As an independent trustee and pension administrator, we are a well-established group that administers more than 8,800 SIPP and SSAS schemes, providing true depth of expertise.

We also provide information updates to provide guidance. These include:

- webinars
- seminars
- newsletters
- exhibitions

We do not encroach on any adviser relationships with clients, and we are able to offer ongoing technical support on existing and new legislation as well as 'out of the box' pension solutions.

We have a great standing among our peers because we have integrity, expertise and a great track record.



## Guidance for life

Below is a selection of our services...

### Birth and childhood



- Childhood pensions
- Trusts
- Junior ISAs

### Education and workplace



- Financial education and wellbeing
- School fees
- Employee benefits

### Business start-up



- Protection
- Property
- Financial planning

### Established business and maturity



- Investments
- Loanbacks
- Employee benefits

### Family life



- Protection, Wills and Powers of Attorney
- Property

### Retirement



- Pensions
- Investments
- Financial planning

## Our people make our business

Our business is built on the integrity and expertise of our people, who continue to help and advise our clients with real passion.

Our success is underpinned by dedicated, versatile and experienced individuals whose personal approach has fuelled our sustained organic growth. Today, Mattioli Woods' employees are the company's 11th biggest shareholder. Most importantly, we are a team, working together to deliver great outcomes for our clients.

We have created a business our clients are proud to be a part of, and our people feel proud to work for. Our core client-facing teams are:

#### Consultants

Our consultancy team builds long-term relationships with clients – either personal or corporate – by providing a hands-on and tailored service. The strategies our consultants put in place can adapt to the changing needs of both the client and any new legislation.

#### Client relationship managers

Our client relationship managers deal with every aspect of client administration, acting professionally and diligently at all times.

The work of both of these teams is backed up by the many other passionate and experienced people we have behind the scenes, who – across several functions – provide valuable and outstanding service and support to keep the client at the heart of what we do.



For more information or to arrange a meeting, please email us at [info@mattioliwoods.com](mailto:info@mattioliwoods.com)

# Get in touch

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**Mattioli Woods plc is a leading provider of wealth management and employee benefit services.**

We pride ourselves in building long-term relationships to provide trusted advice, high standards and a personalised delivery.

We provide our clients with an all-embracing and integrated approach designed to develop a clear strategy for financial plans, supported by sound investment and taxation initiatives.

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