

PRESS RELEASE

MONDAY 24TH MARCH

ROCKWEALTH LLP OPEN FOR BUSINESS

NEW IFA FIRM OFFERING ONLINE INVESTMENT PLATFORM AND DISCRETIONARY SERVICES

RockWealth LLP, the Cheltenham-based IFA firm, today announced it is open for business. Following FCA approval in February, the firm's website is now live providing clients with a choice of online investment and discretionary wealth management services. At launch the firm will manage over £10m funds under management on behalf of 100 clients.

Wealth Management Client Service – fee-based, face to face advice

Face to face financial planning and wealth management with a focus on providing independent, whole-of-market advice, completely tailored to client's needs. These clients receive ongoing advice with regular portfolio reviews and personalised reports as well as direct access to the *True Potential* online wealth management technology with sophisticated planning and charting capabilities. Hourly client fees range from £75/hour for support staff through to £225/hour for a senior partner.

Investment Client Service – RockWealth Investment Platform online via www.rock-wealth.co.uk

RockWealth's new investment management platform offers clients access to over 5,000 investment funds and exchange traded funds – supported by several leading DFMs including Brewin Dolphin, Brooks Macdonald, Rowan Dartington, Quilter Cheviot and Investec. RockWealth's investment clients will be able to purchase discretionary fund manager (DFM) run portfolios in ISAs and general investment accounts (GIAs). These will be managed by a selection of DFMs that RockWealth selects and each has access to research capabilities and the capacity and discretion to make the necessary changes to a portfolio as and when economic conditions and fund performance dictate.

A range of five risk rated portfolios as well as a moderate risk ethical portfolio will be available, all with zero switching or trading costs.

Tim Horrocks, managing partner, explains:

“Our investment clients can be secure knowing that the risk of their chosen portfolio will be carefully managed with regular rebalancing. We are not offering a fund supermarket or pure DIY option. It's a case of you want to invest but you don't have the expertise to choose funds. You select your risk profile and leave the asset allocation, fund picking, ongoing research, switching etc to the experts. Overall we think you'll achieve better results with less volatility for a given risk without the headache of making investment decisions in what is a difficult economic climate.

“What makes us different is that clients using RockWealth's online service get access to all the benefits of full discretionary fund management with regular rebalancing at a cost that is easily accessible to a more average investor”.

The RockWealth online investment service and website is available at www.rock-wealth.co.uk For up to date news please follow the social media updates via @rockwealthuk (twitter), linked-in and facebook company pages.

ENDS

For further information please contact:

Tim Horrocks, Managing Partner, RockWealth
tim@rock-wealth.co.uk

Tel: 01242 505505 / 07799 340468

Tanith Harding, Mitchell Money Penny
nicola@mitchellmoneypenny.com

Tel: 01242 703266 / 07986 819 583

Notes To Editors

RockWealth is a firm of professional independent advisers specialising in wealth management and creation on behalf of professionals, business owners, entrepreneurs and trust funds. Tim Horrocks has been an IFA for over 11 years including 3 years with SJP after earlier careers with both HSBC and Lloyd's private client divisions.

RockWealth's mission is always to strive to excel and surpass expectations. Advisers at RockWealth will independently select the most appropriate products and services for clients from across the

whole of the market with the highest calibre of discretionary fund managers being employed to independently monitor all investments.

Costs

Non- advised direct investment: £250 regardless of amount or number of transfers. You are able to make an investment through our website into ISAs and General Investment Accounts if you do not require any financial advice but want to take advantage of our sophisticated approach to investment management.

Advised Investments: Typical fee of £2,500. Maximum of 3% of the investment or £5,000 whichever is lower, subject to £750 minimum. Advice is recommended for all clients and is particularly important if you require advice on investing your money such as seeking the most appropriate tax wrappers, receiving a comprehensive review of your current financial situation and conducting cash flow forecasts to see how much money you will require to achieve all of your investment goals