

**Sesame Bankhall Group Ltd**

Registered Office: Pixham End, Dorking, Surrey RH14 1QA

Registered in England No. 3573352

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## PRESS RELEASE

### **Sesame Bankhall Group partners with Henderson Global Investors to launch Optimum Investment Management**

Sesame Bankhall Group is joining forces with Henderson Global Investors to launch an investment company that will help adviser firms to create bespoke investment solutions for their clients.

The new joint venture, which is subject to approval by the Financial Services Authority, will be called Optimum Investment Management Limited. The new company forms part of an integrated wealth management solution that is being developed by Sesame Bankhall Group and which incorporates risk profiling and a back office system that links through to investment platforms and funds – making it easier for advisers to do business.

Optimum Investment Management is developing its own unique range of multi-asset, multi-manager investment solutions. These can be blended, and rebalanced, using the Portfolio Analyser tool, to create and maintain bespoke portfolios that precisely match the client's risk appetite.

The investment solutions will have a transparent pricing mechanism and are designed to achieve above average performance with reduced volatility and below average charges.

Optimum Investment Management will offer advisers access to an investment solution that is managed by Henderson's award-winning multi-manager team combining an active approach to asset allocation and fund selection with outstanding investment knowledge. The solutions will be run as a team strategy with Tony Lanning, a director of Henderson's multi-manager business, as lead manager and Helen Bradshaw as co-manager.

**George Higginson, Sesame Bankhall Group Chief Executive Officer** says: "We are using our scale and expertise to develop an integrated wealth management solution that isn't just for the wealthy. Optimum Investment Management will give adviser firms and clients - even those with modest investments - access to a service and fund managers that they wouldn't be able to get on their own.

"Henderson has an excellent investment pedigree and an award-winning multi-manager team, which makes them the ideal partner for this exciting new venture. We believe that this will be a compelling

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solution for both experienced investment IFAs along with general adviser practices who only write this type of business occasionally.

“This new service will help advisers to deliver a more efficient, valuable and bespoke service to their clients. We are helping advisers to write business safely and efficiently, which will become even more important in a post-RDR world. The new service will also give advisers the opportunity to de-risk their business by incorporating a compliance process that helps firms to better manage regulatory risk when writing investment business.

“We are helping advisers to increase the value they offer their clients and deliver an ongoing service. This in turn will help advisers to develop more recurring revenue and, ultimately, to build greater embedded value in their firm.”

**David Jacob, Chief Investment Officer at Henderson Global Investors**, comments:

“We are delighted to be partnering with Sesame Bankhall Group: bringing compelling investment solutions to clients and advisers is what financial advisers and asset managers are focussed upon in the post-RDR world.”

- Ends -

**Further media enquiries**

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***Sesame Bankhall Group operates three distinct distribution brands:***

- Sesame is the UK's largest appointed representative (AR) network with 1,400 member firms.
- Bankhall is the market-leading support services business for 1,900 directly regulated IFA firms.
- PMS operates the largest mortgage club for directly regulated mortgage brokers in the UK.

Services provided include compliance and regulatory support, access to one of the UK's most comprehensive training and development programmes, in-depth product research, preferential PI terms and access to the latest technology to enable advisers to write business more efficiently.