



### **ALICE CHAMBERLAIN** Marketing Coordinator

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Saunderson House is a leading firm of independent wealth managers based in the City of London. We provide financial planning and investment services to busy professionals. Our clients comprise high net worth individuals (HNWIs), trusts and other institutions. We provide clients with a complete wealth management service, helping them achieve their financial goals.

We offer our clients advisory and discretionary investment services. Clients of our advisory service have the opportunity to be involved in ongoing decisions made around their portfolio, whereas our discretionary service allows clients to hand over the detailed management of their portfolio to our specialist advisers. Both are built upon the expert knowledge of our investment research team.

We hold Corporate Chartered Financial Planners status, delivering high quality advice on c£4bn of assets. The firm has maintained its independent status since establishment in 1968, without being tied to any products, funds or services.

To perfect our client service, Saunderson House ensures we stay ahead of our competition and align with industry developments. Evolving technology is central to this, as wealth management clients become increasingly digitally savvy and expect more personal, effortless real-time communications.

Saunderson House's client development strategy is alive to new generations of investors and their changing habits, driven by the digital revolution. Today, 69% of HNWIs use online/mobile banking apps and over 40% review their portfolio/investments online.

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We have therefore invested in technology to ensure we meet this demand. The 2016 launch of our digital client portal and mobile app is amongst our recent achievements and we pride ourselves on its recognition with this prestigious award.

Our approach to the design and creation of our digital portal was as a result of extensive client research, focus groups and feedback. This reflects our core purpose of placing the client and the service they receive central to all our decisions.