

Specialists in providing a high-touch, world class, wealth management service

An Introduction to

Key Capital Private Wealth Management

In 2006, Key Capital established Key Capital Private to provide Irish clients with a world class wealth management service.

Key Capital Private is the trusted investment advisor to many individuals, families and business owners of significant wealth.

Expertise

Our area of expertise is families with greater levels of wealth, where we provide a personalised and bespoke wealth advisory service, developed from understanding both the client and the broader family requirements.

We work with a select number of clients and have considerable expertise in dealing with the dynamics associated with larger, more complex investment portfolios and families.

We have unique access to custody solutions at the world's leading private banks and we access funds for our clients managed by fund managers with track records of out-performance, particularly in private equity.

Our most mature private equity fund, launched in 2012, has delivered a net 14% annual return and total return in excess of 2.4x.

Our Approach

Our investment approach does not utilise internal managers who select direct investments rather we access funds managed by industry leading managers with distinct strategies and track records of out-performance.

We use a range of investment strategies across different asset classes and geographies, including a specific focus on private equity and other unlisted asset classes such as real estate and credit.

Successfully delivering this service requires an ability to source from a large universe of leading fund strategies and we leverage off existing relationships and the expertise and manager access of our partner custodian banks to achieve this.

An outcomes-based approach focused on the specific requirements of individuals and families with significant wealth is our core competency. Understanding the inter-generational mindset of these families with the ability to populate investment portfolios with significant allocations to longer term investment assets.

Integrated Advice

Our partner custodian banks are Deutsche Bank and Credit Suisse. This facilitates us in locally delivering the full suite of wealth management services available from two of Europe's leading wealth management platforms. Key Capital operates an integrated approach with the following key steps:

- Understanding the client – risk profile, investment objectives, overall financial position
- Determining the appropriate investment strategy
- Agreeing the target asset allocation
- Implementation
- Performance monitoring
- Bespoke individual client reporting

Key Capital Private Relationship Management Team

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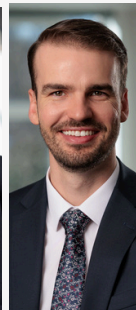
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