

A trusted co-creator of fund solutions



“We see our role as supporting the wider professional team by working with them to facilitate what they do.”

Martin Heffernan

We understand that referrers take a risk when they put a firm forward to act as AIFM, Operator or Depositary and we have a long track record of quickly and consistently demonstrating quality and timeliness of service grounded in integrity while allowing them to keep visibility and control of their client relationship.

A good proportion of our work is repeat activity for the same client in the way it is for many of our referrers. Our attention to the kind of high-intensity interaction necessary to sustain long-term relationships, and our philosophy of constant improvement and investment in our clients, is key to our success.

“We have seen them bring capacity, insight, knowledge and skills to our mutual clients’ success. Their property investment funds team has demonstrated consistent quality, as well as high degrees of integrity, professionalism and loyalty to clients”

Jason Lewis, Howard Kennedy



Simon Webber

“When one of our fund management clients found that an upcoming regulatory change was threatening their business model, we worked closely with two firms of lawyers to co-create a new fund structure. As a result, they could continue expanding their funds under management.

It was the coming together of commercial and practical experience with regulatory and fund structuring expertise. Once it had been successfully implemented, we were then able to roll that same solution out to several of those firms’ other clients.”

[Read about the Small Registered UK AIFM Regime for Property Funds](#)



Kelvin Gray

“When a firm of real estate lawyers we work with were approached by a client setting up a £50m property fund, they asked us to meet them as well to cover the practical realities of working in a regulated environment.

We proposed a fund structure and because of the client’s impressive property experience, suggested they become a Small Registered AIFM with us as the Operator. This allowed them to focus on what they do best, sourcing, buying and managing the properties, knowing that we would take care of the regulation and administration. We could even help them get registered with the FCA and take care of all their regulatory reporting. This gave the client the confidence to instruct us and the solicitors to act.”

If you would benefit from a partner in the management of your next property investment vehicle, please contact us for an early discussion.

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