SPARTAN
FINANCIAL SOLUTIONS

Investment Philosophy

The client is at the centre of everything we do.

We start with producing a complete picture of the client’s financial position and risk tolerance through a personalised Investment Policy Statement.

Thereafter, the client remains involved in the process through every step of the journey.

We favour evidence-based, data-driven processes, routed in independent academic research. We choose funds on this basis but also act as independent advisors, facilitating our clients with solid advice and research if they wish to take a more active approach themselves.

Internally, we comply with all regulatory and compliance obligations but also operate a stringent due diligence process before we accept funds or product onto our investment suite. Our investment committee meet regularly and ensure our adopted strategies are fully tested and evidence-based.