Advisory Portfolio Management

Sanlam’s advisory portfolio management and stockbroking services offer private and professional investors the freedom and flexibility to take control of their investment journeys.

Our advisory portfolio management and stockbroking services are ideal for both private and professional investors who want to be involved with managing their investments and making decisions. We offer different options depending on how much control clients require as well as access to valuations online.

We've designed these services for a wide range of clients, including individuals, pension funds and companies as well as charities and trusts of all kinds and sizes. Working with their financial advisers, our investment experts provide the support and guidance they are looking for to meet their financial objectives and fiduciary responsibilities.

They can choose from a wide selection of accounts, giving them the control and flexibility to meet their needs in the most efficient ways. These include general investment accounts, individual savings accounts (ISAs), self-invested personal pensions (SIPPs) and small self-administered schemes (SSAS) as well as offshore life assurance bonds.

Why use Sanlam's portfolio advisory services?

Our experienced investment specialists deliver a powerful combination of expertise and insight. They offer fast and efficient access to the global capital markets and a wide universe of potential investment opportunities across all major asset classes as well as third-party funds.

Whatever the size of the assets your clients manage, and whether they trade securities every day or just a few times a year, we dedicate ourselves to building long-term relationships. We also offer the reassurance that comes from partnering with one of the world's leading financial services groups.

We offer three services to help meet you and your clients' needs: advisory managed service, advisory trading service and an execution-only service.

Advisory managed service

This service is ideal for investors who wish to retain control of their investment decisions, but want advice and support from Sanlam's investment experts. Depending on what kind of service or support your client is looking for, our investment managers can wait for you or your clients to contact us or monitor portfolios and make recommendations about buying and selling investments for them when appropriate.

Your clients will already have agreed their investment objectives, attitude towards risk and timeframe with you. We will then contact them for explicit approval for each and every investment decision. As a result, they have all of the benefits of close contact with an investment manager, including regular monitoring and advice, but the final decision remains with them.

Advisory trading service

Sanlam's advisory trading service is appropriate for investors with the confidence to manage their own portfolios and make investments decisions. Clients benefit from the advice and guidance of a dedicated investment manager but retain the freedom to select investments to create their portfolio and deciding when to buy and sell securities.

This service is suitable for clients who have the time, experience and knowledge required to seek out opportunities and navigate the risks.

Our seasoned investment managers have many years of experience working with both private and professional investors, understanding their needs and working together to achieve your clients' investment objectives.

Execution-only service

Private and professional investors who do not require investment advice use our execution-only service to buy and sell securities in line with their instructions. Our experienced trading desk, provides access to more than 25,000 securities, funds and instruments in domestic and overseas markets, including some illiquid assets that can be difficult to trade.

Our hands-on service puts communication at the centre of every trade – speaking to our broker network and keeping clients informed so that they are always in control of the execution function. We ensure we can interpret their intentions accurately and implement their investment decisions quickly and efficiently.