

Featherstone Partners



FEATHERSTONE INVESTMENT PARTNERS are 'deliberately different':

- Founded as a single-family office, its clients invest alongside and in the same way as the original family.
- They provide access to lesser-known and harder-to-discover funds than private clients and mass-market wealth managers typically have exposure to.
- Their clients enjoy the many benefits of a smaller, friendlier and more accessible firm, whilst benefiting from the team's experience working for companies such as Goldman Sachs, UBS, Odey & Deloitte.

FAMILY OFFICE

Featherstone Investment partners are part of a group founded in 1999 to manage the investments of a single family – who remain the largest client.

In an era when many firms try to claim the title of 'Boutique' or 'Family Office', Featherstone are genuinely both. Their founders, staff, families and friends are amongst their largest (and smallest) investors.

James Barton, an Odey alumnus with more than a hint of his former boss's affability, says, 'our clients share our frustration with a bland and ever-homogenising industry which seems to focus more on shareholders than on clients. We set out to offer clients something genuinely and deliberately different.'

'We are all refugees from large firms and feel that clients prefer a friendlier and more inclusive firm whose interests are aligned with theirs,' adds Andrew Cox, who was formerly with Goldman Sachs.

'There is a common misconception that larger firms are better. We appeal to a more informed group of people who suspect that they are not.'

BOUTIQUE INVESTMENT MANAGEMENT

The investment managers within the group are recognised as industry leaders in creating multi-manager funds. Selecting the best specialist practitioners globally, they have recently been shortlisted for the Investment Week Fund Manager of the Year Awards.

Barton speaks with authority, having worked for some of the most respected names in the industry. 'The truth is that, due to liquidity issues, the best funds can be off the menu for larger firms, who are often restricted to mass-market mediocre investments... thus constraining their clients to a bleak existence of "benchmark tracking". We have a significant competitive advantage.'

Alex May, Head of Financial Planning, comments: 'It is clear to us that a portfolio consisting of various specialist fund managers, based around the world and focusing on specific sectors, geographies, themes or asset classes, is likely to perform better than the one-man, generalist approach typical within the industry.' These funds are often more niche, higher quality and lower profile than many private investors have exposure to.

FINANCIAL PLANNING

'Financial planning has a bad image in this country, which is probably justifiable,' Barton says with a smile. 'One of our clients described us as "financial advisors for people who don't like financial advisors", which is the greatest compliment we could get!'

Featherstone believe that financial planning should go hand in hand with investment management. 'Investment management and financial planning are typically regarded as separate services,' explains Alex May. 'We make no distinction between the two functions. In our experience these functions are rarely done well together.'

FOCUS

- Family office
- Boutique Investment management
- Financial planning

OFFICE

London

SIZE

Boutique/
Family office

FEATURED

James Barton
Alex May
Suzy Brinkmann

'Unlike the majority of our peers, we typically do not charge upfront fees,' continues May, 'which creates a greater focus on quality and removes the transactional nature of traditional financial advice.'

Featherstone Investment Partners helps clients with all sorts of financial planning issues including trusts, pensions, inheritance tax planning and tax efficient school fee planning.