
Amethyst

Expert wealth management without the hassle



Amethyst is particularly suitable for those whose financial knowledge is limited but who still want to reap the benefits of carefully selected investment decisions.

Amethyst is perfect for clients who lead busy lives and wish to focus their energies elsewhere in the knowledge that their capital is being managed effectively. It also offers the right service for people who are focused on accumulating wealth as well as those looking to manage and protect what they already have.

Amethyst can take the worry out of your finances once and for all, delivering peace of mind allied with strong professional advice.

The Amethyst Client Service

Annual review meeting	A complete review of your financial strategy The Crawford Consulting Financial Health Check
Telephone and email support	Telephone: 01603 219689 Email: info@crowfordconsulting.co.uk
Portfolio management service	Portfolio monitoring Rebalancing of asset allocation A portfolio valuation each year
Risk monitoring service	Regular reviews of your attitude to risk Regular assessment of the risk profile of your portfolio
File maintenance service	Ensure essential records are kept up-to-date