

Smith & Williamson Investment Management's continued association with Investmaster

Smith & Williamson Investment Management (SWIM) recently won the coveted 'Investment House of the Year' category at the annual STEP* awards ceremony.

The criteria for the award included demonstrating innovation in private client practice, a highly qualified team, dedication to clients and a broader contribution to the profession, including corporate social responsibility. The Smith & Williamson ethos is one of being "trusted advisers" and this includes not only courteous and informed client interaction but importantly delivering the right solutions to meet customer expectations and needs.

As SWIM point out, a key part of being able to achieve these aims, whilst minimising costs, is through the use of the right technology and with the right technical partners. In July Smith & Williamson signed a new 5 year contract with Investmaster, the leading provider of Wealth Management software solutions. The Investmaster solutions continue to provide over 400 SWIM staff with timely and accurate Portfolio information (uploaded from SWIM's own internal systems) and decision making tools, Investmaster execution functionality also supports SWIM's transactional processes,

A critical part of the investment process is that of compliance. With the FSA looking extremely closely at financial activities, SWIM continue to adopt and upgrade processes in this area, an important element being market trade settlement and transaction reporting. The Investmaster solutions continue to support these increased processes, rules and SWIM's growth in its client base and activities.

David Cobb, Head of Investment and Banking at SWIM commented: "We are delighted to have been named as Investment House of the Year. We have continued to perform well, which is particularly pleasing this year given the economic circumstances. This award gives credit to our investment team for their hard efforts over the past year and we remain focused on doing the very best for our clients.

James Gordon, Smith & Williamson IT Chairman also commented: "We are delighted that we will continue to work with Investmaster over the coming years. Our history of working together to provide a leading service to our customers has been extremely successful. We are now looking at furthering this success and enhancing our services together."

Peter Little, Investmaster CEO, stated: "SWIM's continued trust in Investmaster as a key solution partner is and will continue to be tremendously important to Investmaster. We are having a fantastic year, along with Heartwood Wealth Management going live on our solution, and Cornelian Asset Managers contracting with us for our InVantage solution, 2009 is seeing the re-emergence of Investmaster as the market leader."

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* The Society of Trust and Estate Practitioners (STEP) awards bring together international market leaders from across the private client professional service industry, including solicitors and attorneys, accountants, barristers, bankers, trust managers, wealth managers and financial advisers.

Disclaimer

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Note to editors

Smith & Williamson is an independent professional and financial services group employing 1,500 people. The group is a leading provider of investment management, financial advisory and accountancy services to private clients, professional practices and mid-to-large corporates. The group operates from offices in London, Belfast, Birmingham, Bristol, Dublin, Glasgow, Guildford, Salisbury, Southampton and Worcester.

Smith & Williamson Investment Management is part of the Smith & Williamson group.

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