



MULTREES

# About Multrees Investor Services

For professional adviser use only



## About

Since 2011 Multrees has supported independent wealth managers and private investment offices that look to enhance client outcomes. Combining a transparent open architecture investment offering with a complementary and unconflicted custody and investment administration platform, we deliver for you and your customers.

By recruiting the right service and operations professionals, combining their skills with modern flexible technology, and by providing a simple transparent fee model, we set out to establish and grow a new type of firm. We focus on delivering high quality services in support of complex clients and multi-asset, multi-currency investment propositions.

As a result of this fresh approach, and a commitment to maintaining a high quality service through controlled and manageable growth, Multrees has been successful at working with some of the most prestigious firms that are involved in managing the wealth of high net worth, ultra high net worth and institutional clients. A deeper understanding of the challenges and a total commitment to delivering a 'next generation' set of independent custody and consolidated reporting systems drives our service proposition forward.

## Our Background

- Independent provider of global custody, investment administration and reporting services
- Open architecture infrastructure
- Best of breed modular technology
- Strong financial backing
- Unconflicted service offering
- FCA Authorised & Regulated
- No debt or trading/risk businesses
- Organic, manageable growth strategy
- Underlying multi-bank agent network

## Our Services

### Global Custody



### Investment Administration



### Reporting Services



### Client & Investment Management Tools





## A straightforward business service

We do things simply and well. We don't trade or advise. Instead we are fully dedicated to providing you with the specific systems and services you need to develop your business.

When you deal with Multrees, whether it's your dedicated relationship manager or another member of your shared service model operation, we will subscribe to a work ethic and dedication to quality that is embedded throughout our business.

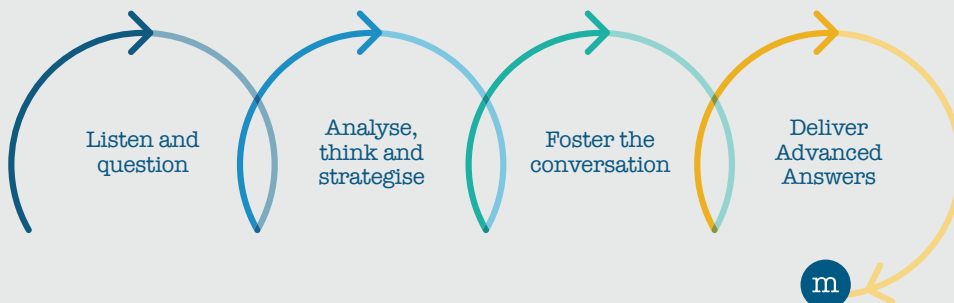
Our team is an extension of your business, working with you to deliver responsive and efficient client-focused services.

## Fresh technology overcomes legacy systems

With the pressure on to invest in improving scalability and profitability, and the growing forest of regulatory requirements, wealth management firms are increasingly faced with the burden of dealing with legacy systems.

Outsourcing to Multrees relieves you of that burden giving you the resources to provide a powerful combination of leading edge technology and know how, future-proofing your offering.

## A unique, constructive approach



We look forward to building on Multrees' success by continuing to employ the best people, staying at the forefront of wealth management technology developments, and supporting our client firms in creating the best customer outcomes.

**Chris Fisher**  
CEO of Multrees

For further information about our business support solutions please contact your usual relationship manager at Multrees. Alternatively, you can contact us on 0131 247 5000 or by email at [info@multrees.com](mailto:info@multrees.com)

Multrees Investor Services Ltd is authorised and regulated by the Financial Conduct Authority (FCA).