



### Strategy Name

Growth Balanced

### Inception date

01/07/2023

### Wrappers

GIA, ISA & SIPP

### On or Off Platform

On

### Base Currency

GBP

### VAT on Fees

No

### Management Fee

0.15%

### OCF of funds

0.35%

### Transaction Cost of Funds

0.08%

### Management Team



**Tomiko Evans**  
Chief  
Investment  
Officer

**Mike Buckle**  
Investment  
Manager

### Investment Objective

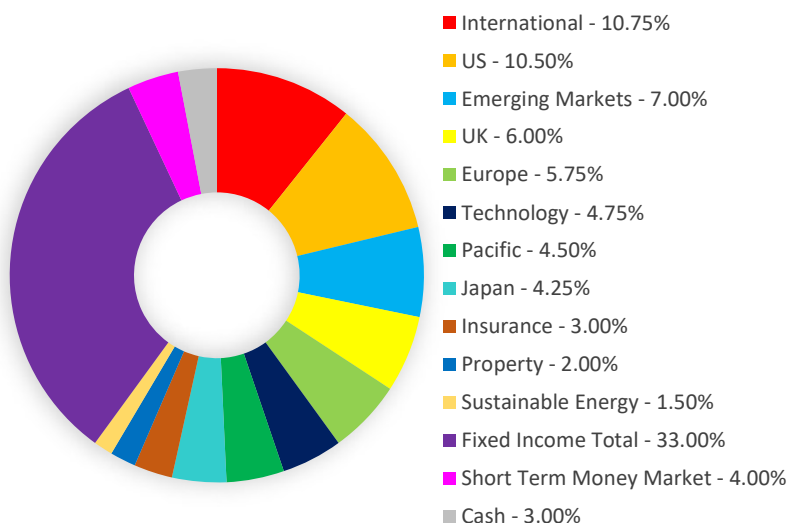
The Growth Balanced Portfolio is a growth strategy which invests in a globally diversified range of leading active and low-cost passive funds. It is aimed at medium to long-term investors who are seeking capital growth from a balanced portfolio of diversified investments.

The equity element of this portfolio will not exceed 60%.

The chosen funds can invest in UK and overseas equities, commercial property, fixed interest securities, natural resources, precious metals or cash.

The Growth Balanced Portfolio is benchmarked against the average performance of the IA Mixed Investment 20-60% equity sector.

### Asset Allocation Breakdown



### Platform Availability





## IMPORTANT INFORMATION

**The Crossing Point Portfolio Management Service is only available to investors who use the ongoing services of a financial adviser. For information purposes only, please contact a personal financial adviser for further information.**

Independent financial advisers take no responsibility for the underlying investment strategy, the investment process and selected funds are the responsibility of Crossing Point Investment Managements' Discretionary Fund Managers. By the nature of discretionary fund management, holdings will be bought and sold, but the investment manager will not seek your permission to do this. Investment decisions will be the responsibility of the Discretionary Fund Manager.

Calculation of the fund OCFs shown is provided by FE Fundinfo. This charge may vary across the various platforms where the portfolios are available. Please refer to your investment adviser for details.

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