



A TAILORED SERVICE FOR  
PROFESSIONAL CLIENTS



PLATINUM  
COLLINS SARRI STATHAM



## WHY COLLINS SARRI STATHAM INVESTMENTS?

Collins Sarri Statham is a small but dynamic team of experienced market professionals, the management can draw on over 40 years of market and management experience. When we add in staff and management – together our team can provide clients with over 100 years of market experience and insight.

Our aim is to build upon the collective experience of CSS staff to provide a client led business model that is quick to react and change to the high demands of today's financial environment. Let's face it, in this environment you need the support and advice of a dedicated team.

Our key advantage is that given our size, we are not offering a generic package for thousands of clients – we are dedicated to tailoring our service offerings to your unique requirements and return objectives.

We expect the launch of the Platinum service will provide you with an improved toolkit for portfolio and stock selection incorporating more forward looking

and predictive research and analysis coupled with faster trading execution. In essence this service puts you the client in the driving seat – A dedicated service for the active high net worth client.



We see the Platinum service as offering unbeatable advantages for market professionals and we would urge you to consider the merits of an enhanced service provision. ”

For more information about our Platinum Service or to arrange an appointment to sign up for the exclusive benefits please contact a member of the Senior team on 020 7481 6868 or via email [info@css-investments.com](mailto:info@css-investments.com)

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## YOUR PERSONAL ACCESS TO TECHNICAL AND FUNDAMENTAL ANALYSTS

We want to give you direct access to experienced market professionals. We want you to have in addition to your broker, a “hotline” to our analyst team. These specialists will provide you with further insight and context behind market and stock movements. You may find this augments your own experienced approach.

Our aim is to provide you with up to the minute market news on game changing announcements with a high level of analysis expediently via email and possibly SMS in the near future.

For example, when companies make statements to the market, the price may move rapidly in response. We aim to interpret and provide an insight quickly – this

will give professional clients an edge. This is aimed at providing expert analysis in a similar timeframe to that provided by major institutions to their client base.

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We commit to providing two incisive reports per day from our analysts on market moving information.



We want to provide you with detailed information on global market trends, emerging themes and companies reporting exciting developments. This will take the form of a monthly newsletter. We shall also provide you with a monthly technical journal reconciling our technical trades for the month, giving you valuable insight into the workings of a qualified technical analyst, his latest ideas and valuable education on how to read and interpret charts.

We shall also be providing free seminars on technical analysis delivered by our in house technical analyst. This entails providing you with working examples of how trades are constructed, entry points, exit points and using multiple timeframes to arrive at a constructive conclusion.

The Platinum account offers our clients an enhanced client service offering and superior trading experience. ”

## A COMMITMENT TO REDUCE YOUR DEALING CHARGES

We appreciate you may be very active on particular days; and we would like to emphasise our commitment to assisting your trading. We want to reduce your entry and exit charges to make it easier for you to get 'through the spread' on short-term investments.

We will reduce your dealing charges through a rebate system crediting a percentage of your monthly dealing cost directly back to your trading account. Also, as we are offering this service strictly to professional clients only, as defined by the Financial Services Authority, when dealing with you we will not follow all of the detailed rules currently in place to protect inexperienced investors such as providing you with the same level of risk warnings before you trade. You will receive a letter outlining some of the protections that you will lose through being treated as a professional client prior to an account being opened.

Due to less regulatory obligations being placed on us we will reduce our compliance fee to you by 50% of what we currently charge to our retail clients.

### So just to recap, we're reducing:

- Dealing charges
- Compliance fees
- Transaction time
- Risk warnings



## ACCESS TO A QUALITY BROKERAGE TEAM

Collins Sarri Statham is a corporate member of The Chartered Institute for Securities & Investment. As a business we have aligned our standards and behaviour to that of the institute. The market in general recognises that corporate members are market leaders in quality, integrity and competence and we strongly believe that only when we deliver for our clients are we delivering for our company.

Part of our commitment to service delivery rests with the strength of our broker team – each broker has a minimum of 5 years stock broking experience.



They hold all the relevant professional qualifications and are undertaking a programme of continued professional development and are committed to taking additional exams. We provide assistance and training to our brokers to ensure they are up to speed with the regulatory environment.

The team are responsive to the need to continually make client service their uppermost objective. We have accelerated broker training as part of our commitment to encourage our brokers to complete more professional development than recommended by the industry.

Our brokers will be given extra training in respect of dealing on behalf of professional clients so that at the point of service delivery our broker team, with appropriate analyst support will be well placed to provide an enhanced advisory service in these fast moving markets.



# PLATINUM

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Collins Sarri Statham Investments Ltd.  
6th Floor 5 Lloyds Avenue London EC3N 3AE  
**Tel:** +44 (0)20 7264 2360  
**Fax:** +44 (0)20 7264 2361  
**Web:** [www.css-investments.com](http://www.css-investments.com)  
**Email:** [info@css-investments.com](mailto:info@css-investments.com)