Out of the Ordinary

Vision INDEPENDENT FINANCIAL PLANNING

Investec Wealth & Investment

Wealth & Investment. Right here in Cheltenham

Investec Wealth & Investment's Cheltenham office has been working with Vision since its inception and sponsored the launch of their first office in Falmouth. We are a member of Vision's Discretionary Fund Management (DFM) panel and pride ourselves on the longevity of our relationship with the network.

Investec Wealth & Investment have had an office in Cheltenham for more than 40 years, during which time we have borne some of the most reputable names in stockbroking. Our intention is always to make it easy to do business with us by offering highly flexible and bespoke investment management services designed specifically to support our financial adviser partners, such as Vision IFP Ltd.

Investment Managers

Tim Hurst

Tim is a Senior Investment Director and manages investments for intermediaries, private clients and corporate clients. He has been working in the front office of the industry since 2000 and at Investec Wealth & Investment from 2007. Tim is a Chartered Fellow of the Chartered Institute for Securities & Investment and educated to degree level. Tim is a family man and lives in the Cotswolds. He enjoys sporting activities such as golf, football, cricket, swimming, cycling and walking with his two dogs.

Charles Lawson

Charles is a Senior Investment Director with over 20 years experience in investment management and is a member of the Chartered Institute for Securities and Investment. Upon returning from university in Canada, Charles began his career with James Capel Investment Management prior to moving to Williams de Broë where he became Chairman of the Stock Selection Committee. Charles is married with six children and lives near Ross-on-Wye.

Charles Purves

Charles is an Associate Investment Director who has worked for Investec Wealth & Investment since January 2008. Charles, originally from Cheltenham, moved from Yorkshire where he studied at University. He specialises in managing portfolios for private clients, charities and family trusts on an advisory and discretionary basis, working closely with solicitors, accountants and independent financial advisers. Charles has a Masters in Wealth Management and is a Chartered Fellow of the Securities Institute.

Mark Walsh

Mark is a Chartered Wealth Manager in the Cheltenham office. He has a First Class Business Management degree and a Masters in Wealth Management. Mark manages portfolios on behalf of private clients, trusts, and intermediaries. He is a Chartered member of the Securities Institute (CISI), and in his spare time enjoys playing sport and generally keeping fit.

Administration

Yvonne Woolridge

Yvonne is a Senior Investment Administrator with many years experience in Banking and Stockbroking. She works closely with the Investment Managers, Clients and Intermediaries. Yvonne was born in Cheltenham but has travelled and lived in various locations around the UK, and has now returned to Cheltenham with her husband Rory.

Richard Morgan

Richard is an Investment Administrator with over 15 years' experience in the Financial Services industry. He joined Investec Wealth & Investment in September 2016 and works closely with Yvonne Woolridge and the office's Investment Managers, clients and intermediaries. Richard is a keen football and music fan and lives in Cheltenham with his wife and baby daughter.

Chris Hutchinson

Chris is a Trainee Investment Manager who joined Investec Wealth and Investment in the summer of 2017 after graduating from the University of Exeter. He provides support to his team of Investment Directors, whilst studying towards his qualifications with the Chartered Institute for Securities and Investment. Chris plays the guitar and is very keen on football and keeping fit.

Carol Sumner

Carol is a Secretary in our Cheltenham office. She has over 20 years' secretarial/administrative experience in both the public and private sector, formerly working for Birmingham City Council and then Severn Trent PLC within the Corporate Finance, Treasury and Taxation departments. Carol lives locally and has a menagerie of animals including cats, a donkey and a retired racehorse.

Head of Intermediaries

Mark Stevens

Mark has over 37 years within the private banking, wealth management and investment industry. He joined Lloyds Estate & Trustee Division in 1975, and subsequently gained significant experience in fiduciary services, delivering independent financial advice, sales management and as a qualified investment manager. He left Lloyds Private Banking in 2002 to join Williams de Broë PLC and was instrumental in developing close relationships with IFAs. Mark was Head of Private Client until 2006 when The Evolution Group plc acquired Williams de Broë (now Investec Wealth & Investment) and was more recently the Head of Marketing and Development.

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