

Accumulate Capital  
Case Study  
**Frank Anderson**



**Accumulate**

Frank Anderson is an existing investor within Accumulate Capital and a believer in the brand, team, track record and future plans.

Frank is in his mid 50's and is an IT analyst by profession. His strategy has been to supplement his state/private pension and has a strong 10-year plan for retirement.

In the past, Frank has invested in fixed-term ISA, gold, stocks, government bonds, and two other corporate bonds and has achieved a blended ROI over his portfolio of 8.25%.

When Frank was first introduced to Accumulate Capital he had accumulated savings of 130k and was looking to achieve 8% on those savings for the next 10 years but could only invest into secure options as he could not afford any capital loss.

After various conversations with us, we learned that he had looked at BTL's but had decided against them due to having no time to manage them, the cost involved, regulatory changes, taxations for landlords, and, of course, the low gross yield on top of that.

It didn't take Frank long to assess how attractive the Riverside Place development was. He invested into this in August 2019, which he received a fixed yield of 11% over a 12-month term.

Frank then reinvested in the Cheyne Walk development over an 18-month term at an 18% ROI and is well on his way to a comfortable retirement.