



HAWKSMOOR

INVESTMENT MANAGEMENT

AIM PORTFOLIO SERVICE

Hawksmoor's **AIM Portfolio Service** provides growth opportunities amongst UK smaller companies and can be used to help inheritance tax planning

Opportunity

- ✓ UK smaller companies
- ✓ Quality, profitable businesses
- ✓ Attractive valuations

Tax Planning

- ✓ Inheritance tax exemptions
- ✓ No complex legal structures
- ✓ ISA eligible

Why Hawksmoor?

- ✓ Experienced professionals
- ✓ Clear, disciplined process
- ✓ Low cost, low minimum

We seek to buy shares that not only qualify for Business Relief* but also are excellent investments in their own right. It is a virtue of our size that we are not restricted to only the largest and most popular of AIM companies, where valuations can become artificially elevated by tax relief demand. Rather, our proprietary investment process combines a disciplined screening process with rigorous fundamental analysis designed to identify value and quality.

**Business Relief allows exemption from inheritance tax once a qualifying share has been held for two years. There are no medicals, the client continues to own the assets and may withdraw cash at any time (subject to loss of the tax benefits).*

Minimum investment £30,000

Charges

Annual Management Charge: 1.5%

Minimum: £500

Dealing commission nil

A £30 bargain charge applies to all transactions.

Important Risks

Capital at risk: the value of investments may fall as well as rise, and you may not get back the full amount invested. AIM share prices may be especially volatile.

Tax rules: Tax rules may change and eligibility for inheritance tax exemption is not guaranteed.

Please see our **Guide to the AIM Portfolio Service** for further information, or contact Jill Gill, Business Development Manager, on 01392 410180 or jill.gill@hawksmoorim.co.uk.



Health Warning/ Disclaimer

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