

Our AIM Portfolio Service invests in exceptional UK smaller companies for long-term capital growth. It can also be used for inheritance tax planning.

Key Benefits

- **Capital and income growth potential** – our goal is to increase the wealth of our clients by investing in outstanding businesses
- **Pass on more of your wealth** – current tax law grants inheritance tax exemption to individuals who make investments in qualifying AIM shares
- **Speed** – to be eligible for Business Relief, the investment must be owned for 2 years. There are no complex legal structures nor is medical underwriting required
- **Access to your capital if you need it** – withdrawal from your portfolio at any time

Minimum Investment

£30,000

Charges

Annual Management Charge:

1.5%+VAT

Dealing commission/fees:

£30 per trade

We do not charge initial or exit fees

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.

Why Hawksmoor?



Award-winning, disciplined investment process



Nimble, whole of market approach



Robust risk control



Hawksmoor's AIM Portfolio Service is managed by a team of experienced professionals



Ian Woolley, CFA
Head of AIM Services



Jim Wood-Smith
Chief Investment Officer



George Salmon
Senior Investment Analyst



Jonathan Rigley
Senior Investment Manager



Ben Luck
Investment Analyst

Please see our **Guide to the AIM Portfolio Service** for further information, or contact Jill Gill, Adviser Relationships Manager, on 07846 932888 or jill.gill@hawksmoorim.co.uk.

HEALTH WARNING / DISCLAIMER

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