

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:

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:

and eligibility for inheritance tax exemption is not guaranteed.

*Until 1st May 2024 we're lowering our minimum investment into our multi-award-winning AIM Portfolio Service to £20,000 for all new ISA applications.

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



Tinzar Minmin
Investment Manager



George Salmon
Senior Investment Analyst



Robert Fullerton, CFA
Senior Investment Analyst



Jonathan Rigley
Senior Investment Manager

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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