

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**  
£50,000

### Charges

Annual Management Charge:  
1.5%

Custody Charge:  
0.2%

**We do not charge initial, dealing, 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.

Please see our **Guide to the AIM Portfolio Service** for further information, or contact Jill Gill, Account Manager, on 07846 932888 or [jill.gill@hawksmoorim.co.uk](mailto:jill.gill@hawksmoorim.co.uk).

## Why Hawksmoor?



**Award-winning, disciplined investment process**



**Nimble, whole of market approach**



**Robust risk control**

**GROWTH INVESTOR AWARDS 2022** | WINNER BEST AIM PORTFOLIO SERVICE

**MONEYAge AWARDS 2025**

**WINNER**

## IMPORTANT INFORMATION

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