

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.

Why Hawksmoor?



Award-winning, disciplined investment process



Nimble, whole of market approach



Robust risk control

GROWTH INVESTOR
2022 AWARDS
WINNER
BEST AIM PORTFOLIO SERVICE

MONEYAge
AWARDS
2025
WINNER

IMPORTANT INFORMATION

This document should not be interpreted as investment advice for which you should consult your independent financial adviser. The information and opinions it contains have been compiled or arrived at from sources believed to be reliable at the time and are given in good faith, but no representation is made as to their accuracy, completeness or correctness. Any opinion expressed, whether in general or both on the performance of individual securities and in a wider economic context, represents the views of Hawksmoor at the time of preparation. They are subject to change. Past performance is not a guide to future performance. This document is for the information of the recipient only and should not be reproduced, copied or made available to others.

Hawksmoor Investment Management Limited is authorised and regulated by the Financial Conduct Authority (www.fca.org.uk) with its registered office at Sterling Court, 17 Dix's Field, Exeter, Devon, EX1 1QA.

FOR PROFESSIONAL ADVISERS ONLY AND SHOULD NOT BE RELIED UPON BY RETAIL INVESTORS

FPC25286/2026