



HAWKSMOOR
INVESTMENT MANAGEMENT

DISCRETIONARY
PORTFOLIO
MANAGEMENT
SERVICE



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WELCOME TO HAWKSMOOR

Our goal is simple: to help you grow your wealth over time, even after inflation, taxes, and fees. We do this by carefully choosing and managing your investments.

We are an award-winning company that helps people invest their money wisely. We manage investments for individuals, trusts, pensions, and charities. Our experienced team focuses on giving you great service and making your money work for you.

Why Use Our Investment Service?

Financial markets are very fast-moving: shares, exchange rates and commodity prices can fluctuate dramatically on the smallest piece of news.

Keeping up with events that can impact your investment portfolio is, therefore, becoming ever more difficult and time-consuming.

Using our Discretionary Portfolio Management Service (DPMS) takes away the headache of constantly monitoring your portfolio. In short, it is a way to invest without worrying about daily decisions. Your dedicated Investment Manager will take care of everything for you.

HOW YOU CAN WORK WITH US

Joining Hawksmoor is easy:

1. Getting to Know You

Your Investment Manager will have a free consultation with you to understand:

- How much risk you are comfortable with (from cautious to adventurous)
- Your investment goals (growing your wealth, receiving income, or both)
- Your tax situation
- Your personal preferences, including ethical investments

2. Creating Your Investment Plan

Your Investment Manager will create a plan suited to you, including example investments that match your needs.

3. Managing Your Portfolio

Once your portfolio is set up, we take care of it for you. We adjust it when needed and use tax allowances to keep it as efficient as possible.





KEEPING YOU UPDATED

You can expect:

- Regular meetings to check if your needs have changed
- Quarterly reports showing how your investments are doing
- A newsletter with market updates
- An annual tax report to help with your tax filing
- Direct access to your Investment Manager by phone or email
- 24/7 online access to your portfolio



WHAT WILL YOUR PORTFOLIO LOOK LIKE?

Your portfolio will be tailored to you. We constantly review it and make changes when needed. This keeps it in line with your goals.

We invest in a range of options, including tax-friendly accounts like Self-Invested Personal Pensions (SIPPs), Offshore Bonds and Individual Savings Accounts (ISAs). We also make sure your investments are as tax efficient as possible.

Your Investment Manager will build a portfolio using a mix of investments, such as:

- UK and international stocks
- Bonds (loans to governments or companies)
- Property and infrastructure projects
- Precious metals like gold
- Other alternative investments
- Cash reserves



WE KEEP YOUR MONEY SAFE

Your investments are held in a secure account. This allows us to manage everything for you, including collecting dividends and handling transactions.

For extra security, we work with Pershing Securities Limited, a trusted company that safeguards investments. BNY Pershing is part of BNY, one of the world's largest financial institutions. They also have insurance to protect against risks like fraud or theft. Both BNY Pershing and Hawksmoor are covered by the Financial Services Compensation Scheme.

We look for investment opportunities across different areas and countries to give you the best chance of success.

We are here to help you grow and protect your money, making investing simple and stress-free.

CONTACT US

Investing in our Discretionary Portfolio Management Service

For more information or to arrange a meeting, please contact:
01392 410180 / info@hawksmoorim.co.uk

Hawksmoor's Portfolio Management solutions include:

- An Alternative Investment Market Portfolio Service
- A Model Portfolio Service for Financial Advisers

Hawksmoor also manages a range of award-winning multi asset funds.

More information about Hawksmoor and our services is available at www.hawksmoorim.co.uk

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Important Information

It is important that you read and understand our Terms & Conditions, which are contained in the Hawksmoor Client Account Guide.

This document is issued by Hawksmoor Investment Management Limited (Hawksmoor), a company authorised and regulated by the Financial Conduct Authority. The Registered Number of Hawksmoor is 6307442 and its Registered Office is at Sterling Court, 17 Dix's Field, Exeter, Devon, EX1 1QA.

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