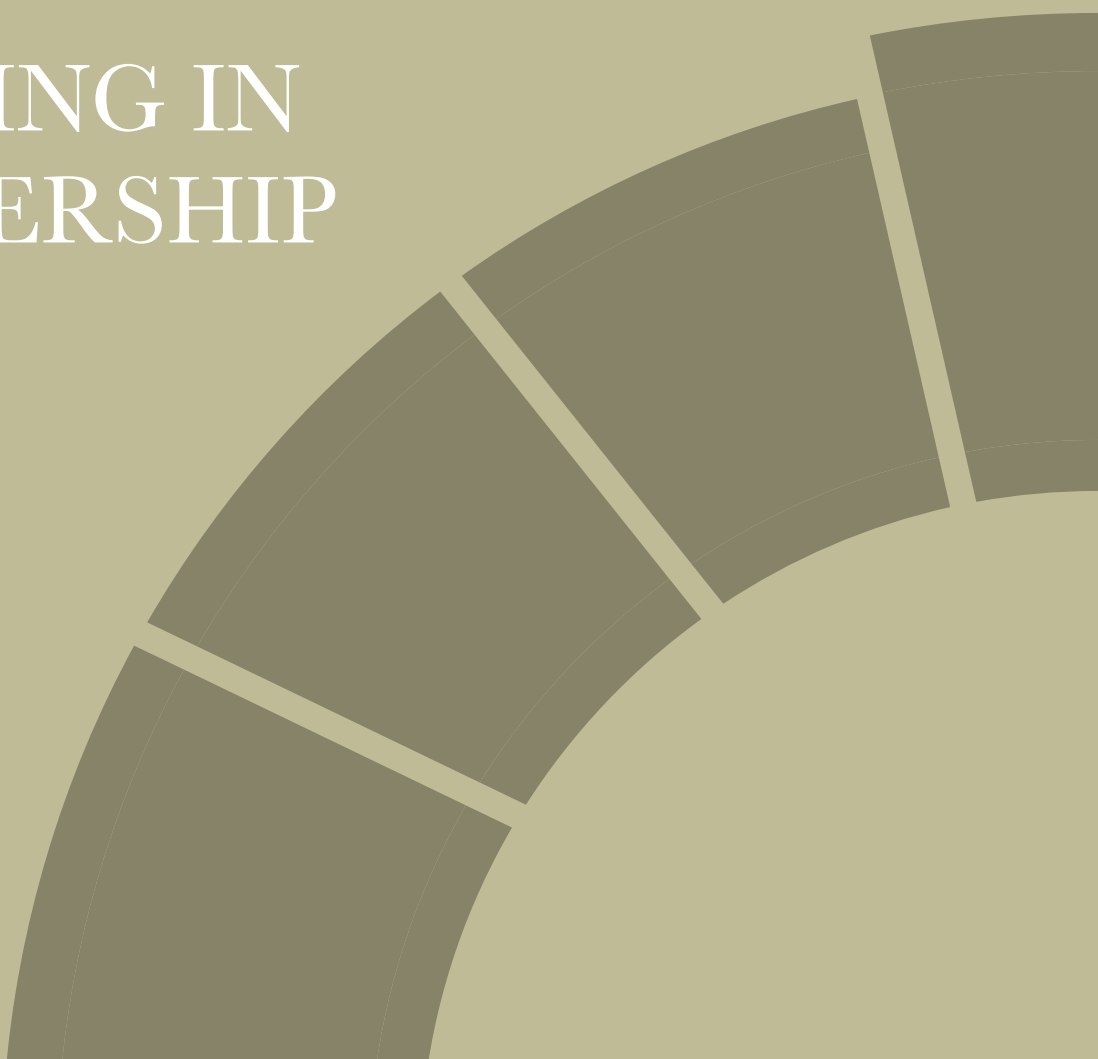
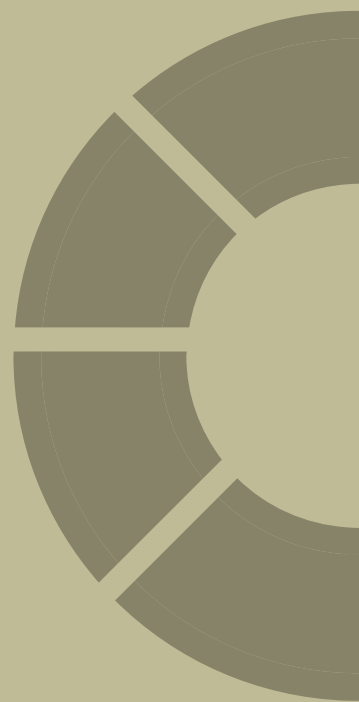




HAWKSMOOR
INVESTMENT MANAGEMENT

WORKING IN
PARTNERSHIP





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WELCOME TO HAWKSMOOR

Our goal is simple: to help you achieve your investment ambitions by working closely with you and your Financial Adviser.

We believe that investing should be personal, transparent, and built around your needs.

And we're committed to:

- Putting you at the heart of everything we do
- Acting with integrity, innovation, and discretion
- Communicating clearly and openly
- Maximising long-term returns on your investments in line with your investment objectives
- Carefully controlling the risk level of your portfolio to keep it within well-defined parameters.

As a result, we're an award-winning investment and fund management company.

TEAMING UP TO ACHIEVE YOUR GOALS

Your relationship with Hawksmoor begins with your Financial Adviser. If they've chosen us to manage your investments, it's because they trust our expertise, service quality, and track record.

Your Adviser will:

- Discuss your financial goals and risk preferences
- Consider your tax position
- Work with us to develop a tailored investment plan

One of our expert Investment Managers will then be assigned to you, ensuring your portfolio is managed with care and precision.





HOW WILL WE MANAGE YOUR INVESTMENTS?

Using the insights from your Adviser, your Investment Manager will create and actively manage a portfolio suited to your unique needs. This includes:

- Selecting investments that match your goals and risk level
- Making adjustments when needed to keep your portfolio on track
- Leveraging insights from our in-house research team, which carefully evaluates investments year-round

We have a rigorous and research-driven approach and will ensure your portfolio reflects your personal preferences, such as ethical or sustainability-focused investments.

Please note that all investments can go down as well as up, and you may not get back the full amount invested.

YOUR TAILORED PORTFOLIO

Once your investment plan is agreed, your Investment Manager will:

- Construct and oversee your bespoke portfolio
- Make changes as needed to keep it aligned with your goals
- Ensure tax efficiency using allowances like ISAs and Capital Gains Tax exemptions
- Handle all investment decisions on a discretionary basis, so you don't need to worry about day-to-day management

We invest across a broad range of asset types. These include equities, bonds, property and more - to ensure we have a good mix.



PROGRESS AND PERFORMANCE UPDATES

To keep you informed, you will have:

- Regular meetings with your Adviser (and your Investment Manager if needed)
- Quarterly portfolio reports with performance updates
- Access to the Hawksmoor Client Portal to view your investments anytime
- A yearly tax report to help with financial planning
- Our newsletter with insights into market trends and investment strategies



HOW WILL WE KEEP YOUR INVESTMENTS SAFE?

Safety is paramount. Your investments are securely held in a ring-fenced account, managed specifically to handle dividends, income payments and trades. We partner with Pershing Securities, a subsidiary of Bank of New York Mellon, a global leader in custody services. Both Pershing Securities and Hawksmoor are covered by the Financial Services Compensation Scheme for added security.



CONTACT US

If you'd like to learn more about how Hawksmoor can support you, speak with your Financial Adviser or visit www.hawksmoorim.co.uk.

Head Office: 17 Dix's Field, Exeter EX1 1QA



This brochure has been printed with biomass toners on recyclable carbon zero paper and supports the planting of native woodland in the UK with the Woodland Trust.

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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Any opinion expressed in this document, 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 and may be subject to change.

Past performance is not a guide to future performance. The value of an investment and any income from it can fall as well as rise as a result of market and currency fluctuations. You may not get back the amount you originally invested. Changes in exchange rates will also affect performance. Please read the prospectus and Key Investor Information Documents (KIID) of any funds mentioned before making an investment.

The information provided in this document does not constitute advice or a personal recommendation for which the duty of suitability would be owed by Hawksmoor, and you should seek your own advice as to the suitability of any investment matter mentioned in this document.

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