BROOKS MACDONALD

Planning your financial future

Our Private Clients service combines financial planning and investment management to help meet your goals.

brooksmacdonald.com/private-clients

How we can help

Helping you to realise your ambitions and secure your future.

Our Private Clients service combines financial advice and investment management to find a wealth management solution that's right for you.

Strong, enduring personal relationships, based on trust and experience, are at our foundation. We will work closely with you to understand your circumstances so we can focus on finding the right financial solutions to meet your short, medium and long-term goals.

Our private client managers are experienced and qualified. We can help you to understand, plan and manage your finances across a broad range of financial products and services.

Your ambitions

We understand that our clients are individuals with their own unique circumstances and aspirations.

Grow your wealth

If you want to get more out of your personal savings and investments, we can help you build and optimise your portfolio.

Sustainable income

If you want to confidently plan for the future, we can help you understand and manage your cash flow so that you can maintain financial security throughout your lifetime.

Planning for retirement

We can help you manage your assets as you prepare to retire or sell a business; then continue to support you through, and into, retirement to help you reach your life goals.

Estate planning

If you want to get your estate in order, we can help form an approach to tax, inheritance and planning; helping to preserve your family wealth through the generations.

Protecting your wealth

When it comes to planning for the future, we can help you by advising and implementing plans for any of life's unforeseen or unexpected events.

Expert advice

Our private client managers are highly qualified to provide you with financial planning and investment advice through our wealth management service.

We use a number of external parties to help us deliver the right services for you. These are all subject to a strict due diligence process to ensure the correct fit for our clients and business.

For clients with particularly complex advice requirements, we also have in-house specialist financial planners to support this.

Working together

Getting to know you is important to us.

We aim to build an open, honest and trusting relationship to enable us to tailor our services to achieve your goals.

Our aim is to help build, manage, and protect your wealth and to guide you through the key financial decisions you will make during your lifetime. We offer a range of services that will take consideration of individual needs, objectives, attitudes to risk and time horizons.

Financial planning is an ongoing process. Your circumstances may alter, changes in legislation could present new opportunities or pitfalls, and the economy can sometimes be turbulent.

Through regular review meetings, we aim to ensure your financial plans are adapted appropriately to reflect any changes in your personal circumstances.

Working with you.

Investment solutions

We aim to build solutions that help meet your investment objectives.

By gaining a deep understanding of your investment objectives and the risk adjusted returns appropriate for your needs, our dedicated professionals construct focused, efficient portfolios on your behalf through a blend of our bespoke and off-the-shelf products.

Brooks Macdonald's range of flexible solutions enables individuals with a variety of requirements and investment risk profiles to access a centralised investment process, and benefit from our expertise.

Our investment philosophy and approach

Our investment philosophy is the beliefs and principles that guide how we approach investing for our clients. We do not take a 'one size fits all' approach.

We always remember that it is your money we are managing. Your investment needs drive everything we do. We take the time to understand you and your investment needs so we can build a portfolio that best achieves your financial goals.

Our investment philosophy is built upon three principles:

Our investment process is built on expert insights and high-quality research. We use the experience and skills of our asset allocation and investment committees, as well as the in-depth knowledge of our specialist research teams. This combination delivers the best investment opportunities in ever-changing markets.

Risk management is central to our investment process. Our flexible investment solutions are overseen by an independent risk department and risk management system. We have a sophisticated risk monitoring system to make sure your portfolio remains suitable for your investment profile.

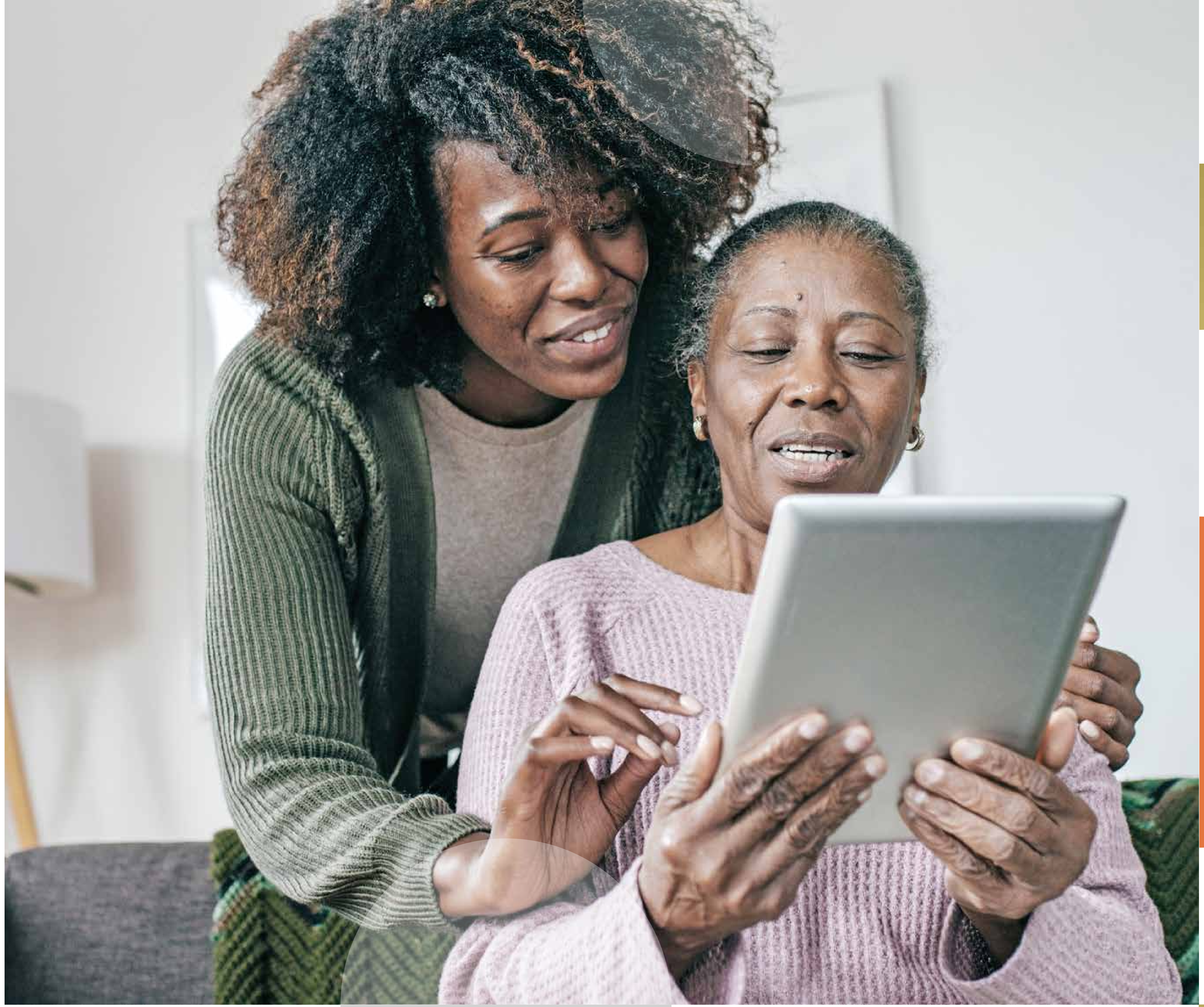
Your private client manager will take all the necessary steps to make sure that your portfolio stays within the investment limits of your risk profile.

A continued focus on your portfolio. Your private client manager has the freedom to build an investment portfolio that suits your needs and any preferences you have requested.

Part of a team

Our private client managers are supported by a team of paraplanners and administrators to ensure we deliver the highest quality service.

Collaboration is at the heart of what we do; our private client managers will also leverage the wider team at Brooks Macdonald, including our investment research and broader team, to ensure that the advice we provide benefits from our comprehensive knowledge and insights.



Becoming a client

Our first meeting with you is free and without obligation.

We would be delighted to discuss your wealth management requirements.

All of our fees are agreed in advance and are based on the value of the assets we are advising on and the complexity of the work undertaken.

To arrange a meeting or simply to have an initial conversation, please email us at **pc@brooksmacdonald.com** or call on **020 7659 5881**.

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Important information

More information about the Brooks Macdonald Group can be found at **www.brooksmacdonald.com.**

Contact us

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T: 020 7659 5881
or visit **brooksmacdonald.com/private-clients**