



BROOKS MACDONALD

# Brooks Macdonald Investment Solutions

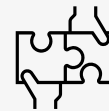
For professional advisers only

## Working in partnership with you to create a powerful end to end business and investment solution.

### Who are we?

Brooks Macdonald Investment Solutions (BMIS) is an in-house specialist consulting team, partnering with you to understand your business goals and aspirations, with a view of creating a central investment proposition that is fit for purpose.

We offer guidance around portfolio construction, market dynamics, investment vehicles and implementation. Using our expertise, BMIS provide actionable solutions to strengthen your business, working with your internal committees in partnership, to ensure the correct framework is in place from the beginning.



Number of partners  
**30**



AUM supported  
**£1.22 bn**

As at end September 2023. BMIS start date June 2020.

### Why engage now?

Markets have evolved...



Asset Allocation is increasingly important for client outcomes



Demand for advice is increasing



Cost and regulatory pressures to continue



ESG has further to go



Need for improved efficiencies and scalability



### About Brooks Macdonald

Brooks Macdonald Group plc, through its various subsidiaries, provides leading investment management services in the UK and internationally. The Group, which was founded in 1991 and began trading on AIM in 2005, had Discretionary Funds under Management of £16.9 billion as at 30 September 2023. Brooks Macdonald offers a range of investment management services to private high net worth individuals, pension funds, institutions, and trusts.



### Why we are different

Our investment solutions are powered by our Centralised Investment Process that aims to bring the best ideas of Brooks Macdonald to all our clients. The investment process sets our macroeconomic view of the world, the assets we buy and the rules our investment mandates conform with. The process also has a rigorous risk framework where each portfolio is tested against our investment rules and outcomes are individually analysed. One of the core drivers of our strong risk adjusted returns has been our disciplined approach to our asset allocation where we use tactical nimbleness within strategic risk ranges, whilst incorporating super macro thematic views and ESG factors across all strategies. The result is a robust and repeatable investment process.



## Your business journey

We can provide solutions for clients throughout their investment journey, to meet their specific goals for growth, volatility management or in drawdown. Collectively, we endeavour to create solutions that will aim to meet your clients' needs in an increasingly complex and ever-changing world.

## Key features

- A partnership model that meets your own pricing requirements and revenue targets, whilst demonstrating value for clients.
- Your input into an agreed investment mandate allowing for oversight, within regulatory framework and permissions.
- Option for co-branded marketing collateral to build your brand and message.
- Regular bulletins in a digestible manner addressing your clients' needs.
- A measurable proposition that delivers efficiencies to your business, reducing your administrative burden.
- 'Open door' approach to Brooks Macdonald Senior Executive team on an ongoing basis to support business growth.
- Support with platform transitions allowing you to focus on your clients' needs.

## Testimonials

"Match our **ethos**"

"It was clear that Brooks had a **good understanding** of what we were looking for and understood the language we used with clients and how our working relationship would benefit the clients on a long-term basis."

"...**deliver the outcomes** that clients and the practice are looking for."

"A truly **premium** offering"

"...a partner who has the same **drive and passion** for the highest possible levels of client service."

"They have also offered **significant support** with helping me grow my business and have offered access to a range of high-level personnel from across the BM business to offer additional **value and guidance.**"

"Readily available"

"Brooks took the time to know us and **built a solution** which addressed the issues."

"They co-branded information in a **timely** manner."

## How do you start your very own BMIS journey?

Get in touch with one of the BMIS team or your local Brooks Macdonald representatives.  
**BMInvestmentSolutions@BrooksMacdonald.com**

## Important information

This document is intended for professional advisers only and should not be relied upon by any persons that do not have professional experience in matters relating to investments. The value of investments, and the income from them, may go down as well as up and neither is guaranteed. Investors could get back less than they invested.

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**More information about the Brooks Macdonald Group can be found at [www.brooksmacdonald.com](http://www.brooksmacdonald.com)**