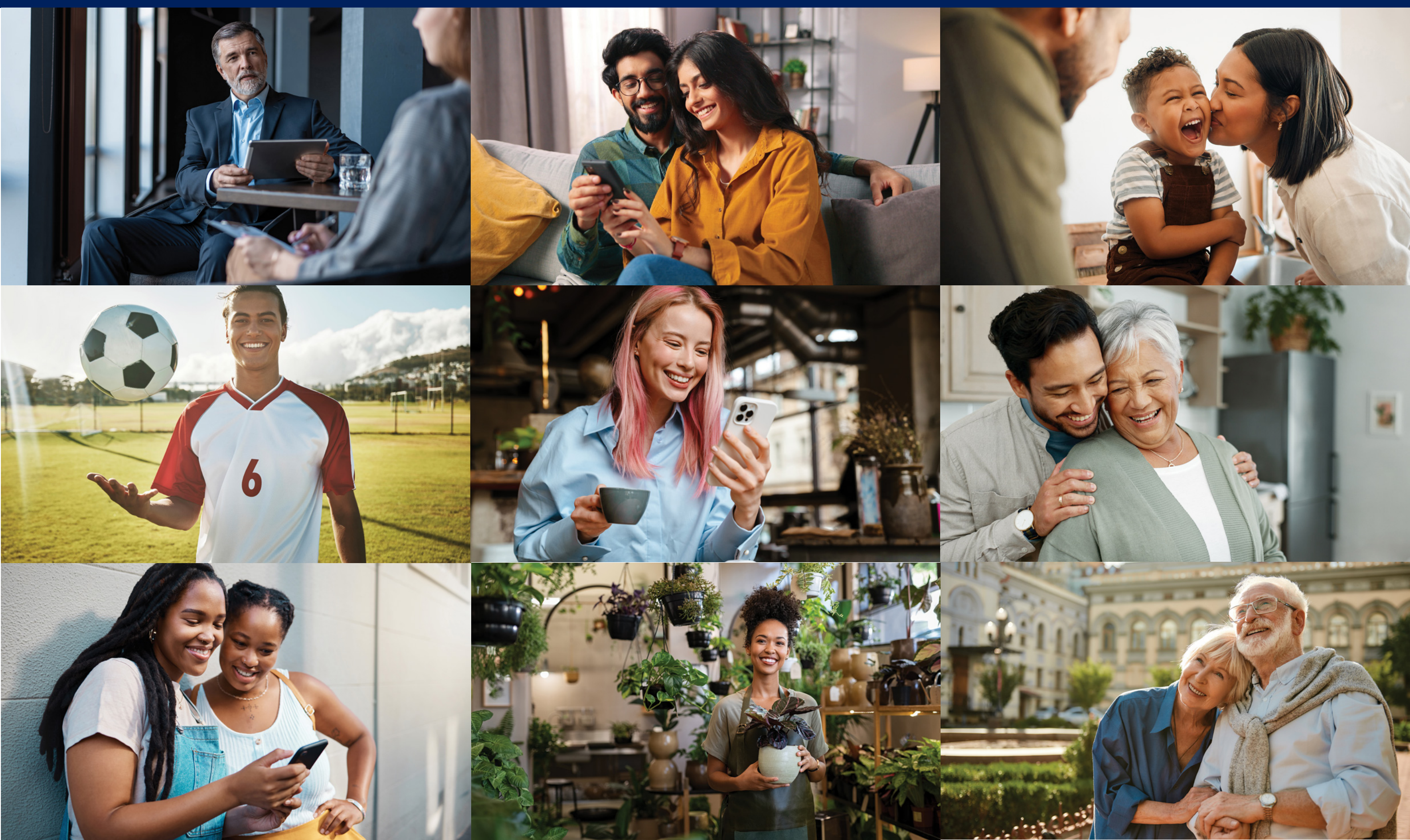
BROOKS MACDONALD

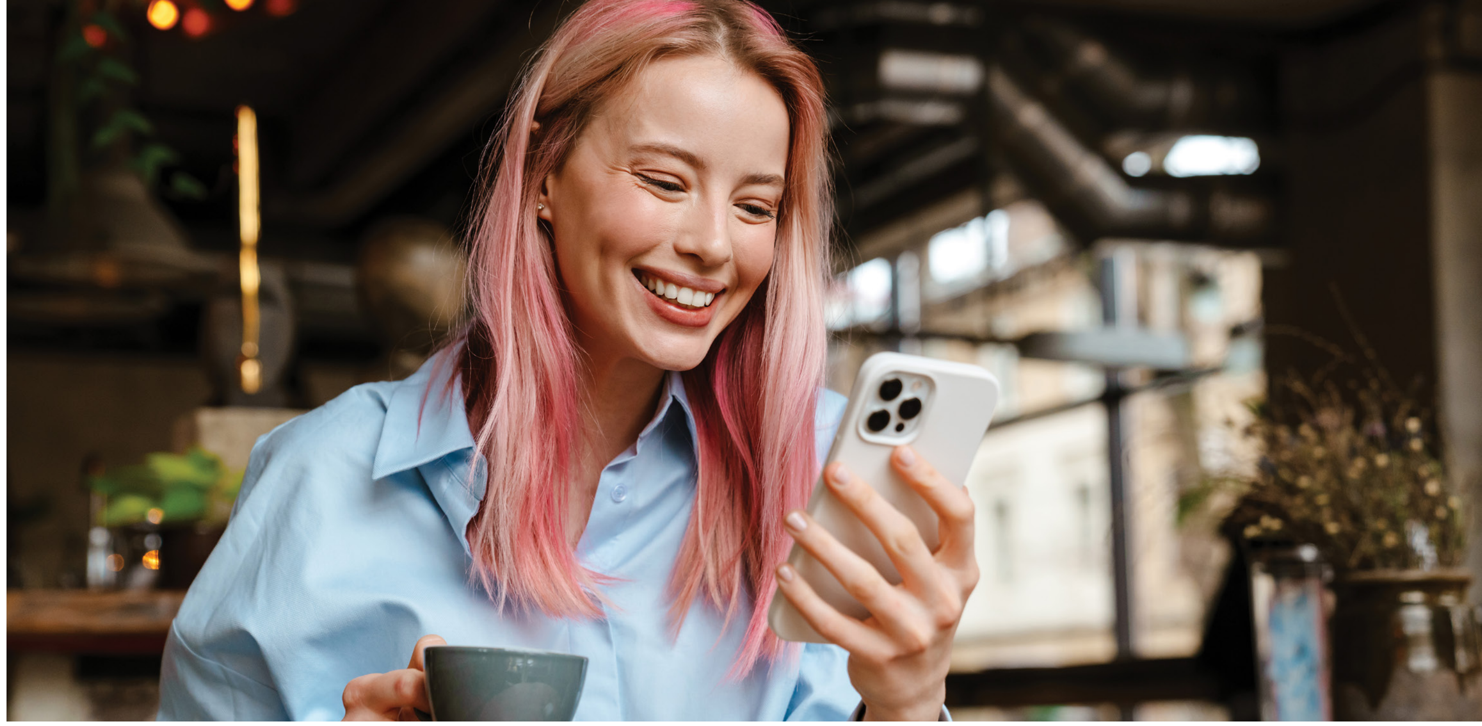
Our Bespoke Portfolio Service

Realising Ambitions.
Securing Futures.
We are Brooks Macdonald.



Everyone's financial journey is unique. Your goals, whether long-term or short-term, will naturally evolve as your personal and financial circumstances change throughout your life. Similarly, your personal values are just as distinct – you may want your investments to reflect the principles that matter most to you.

That's why our Bespoke Portfolio Service (BPS) is different. It's not a one-size-fits-all investment solution; it's a strategy designed to adapt to your individual needs, goals, and values. With our BPS, we work closely with you and your financial adviser to build and manage a portfolio that's truly tailored to you – reflecting your priorities today and evolving with you for tomorrow.



At a glance

Tailored to you
Your investments are built around your unique needs and goals, with the flexibility to grow and adapt as your life changes.

Flexible investment options
From low-risk strategies to more dynamic approaches, we tailor investments to match your comfort with risk and life stage.

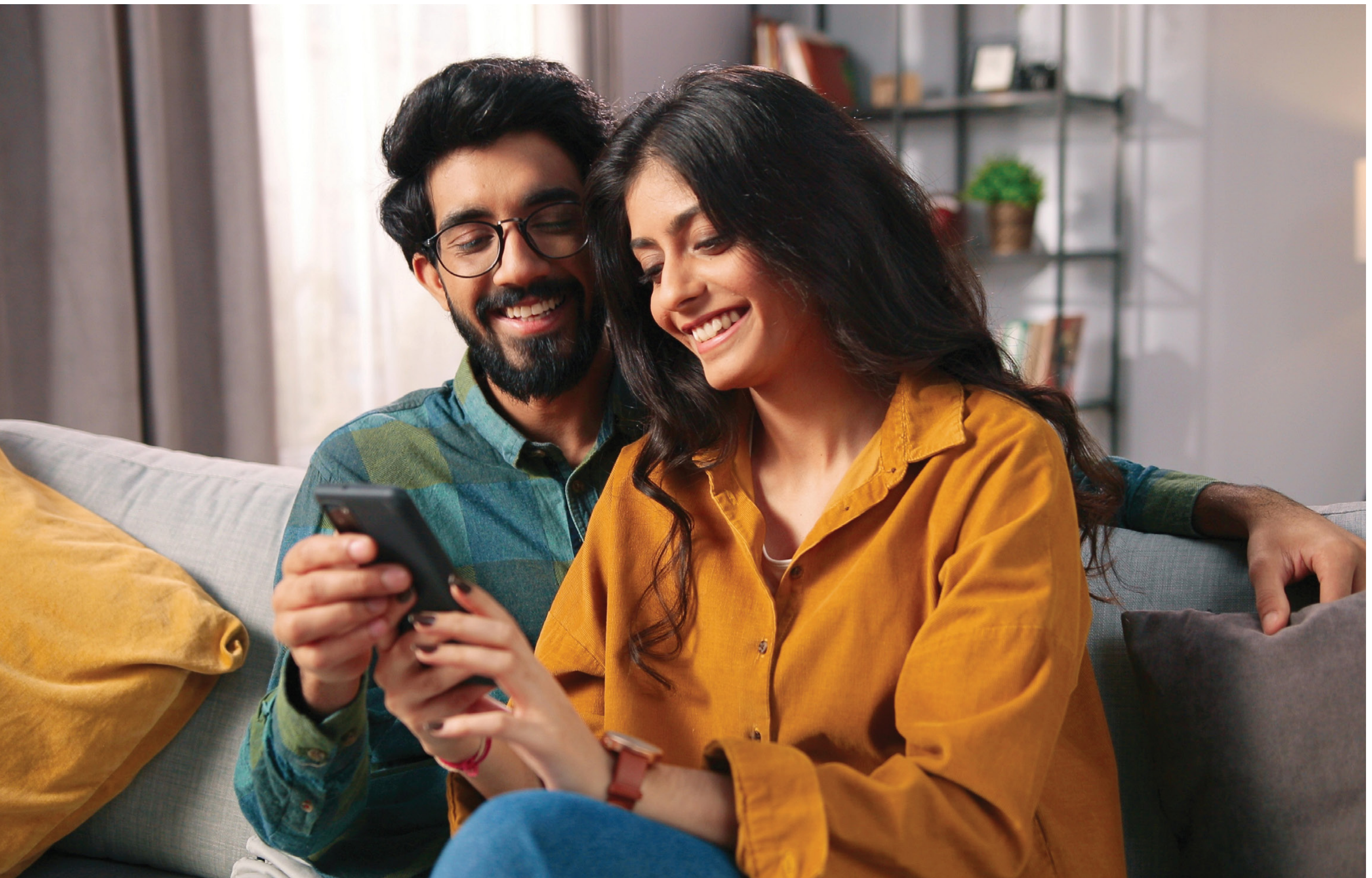
Future-focused planning
Whether it's funding your lifestyle, securing retirement, or leaving a legacy, the BPS will help you plan for the life you want – and beyond.

Expert guidance
Your experienced investment manager is by your side every step of the way, managing your wealth and working closely with your financial adviser.

Regular updates and insights
Personalised reporting and regular in-person reviews provide you with clear insights and continuous support, helping ensure that your financial plan remains in line with your goals.

BPS	Standard investment solutions
Highly personalised to individual goals	Structured, predefined set of investment strategies
Custom allocation of investments based on specific needs	Standard spread of investments
Flexible with a wide range of investment options	Often limited to a specific set of investment options
More flexible in optimising tax allowances and cost-efficient for your needs	Standard cost structure, with less tax optimisation

BPS offers a more personalised, flexible, and adaptive investment solution, making it ideal for those with specific financial goals or evolving needs. Standard investment solutions, on the other hand, are a more rigid option with preset risk profiles.



How does our Bespoke Portfolio Service work?

The BPS supports you through every stage of life. Whether you're focused on growing your wealth, planning for a comfortable retirement, or navigating unexpected events like a divorce or selling your business, this solution is here to help you achieve your evolving goals.

We work closely with you and your financial adviser to gain a deep understanding of your individual investment objectives and requirements, using that knowledge to build a bespoke investment solution best suited to meeting your needs.

This is a discretionary service, which means an experienced investment manager from Brooks Macdonald, backed by 15 specialist sector research teams, will make day-to-day investment decisions on your behalf. You'll be able to talk directly with your dedicated investment manager whenever you want to discuss your portfolio. We'll also meet with you regularly to ensure that we stay up to date with any changes in your needs and adapt quickly to any unexpected life events.

Financial options

Future financial security

Growing your retirement pot

Taking a flexible income

Saving up for a special purchase

Supporting a family member's education

Covering care costs

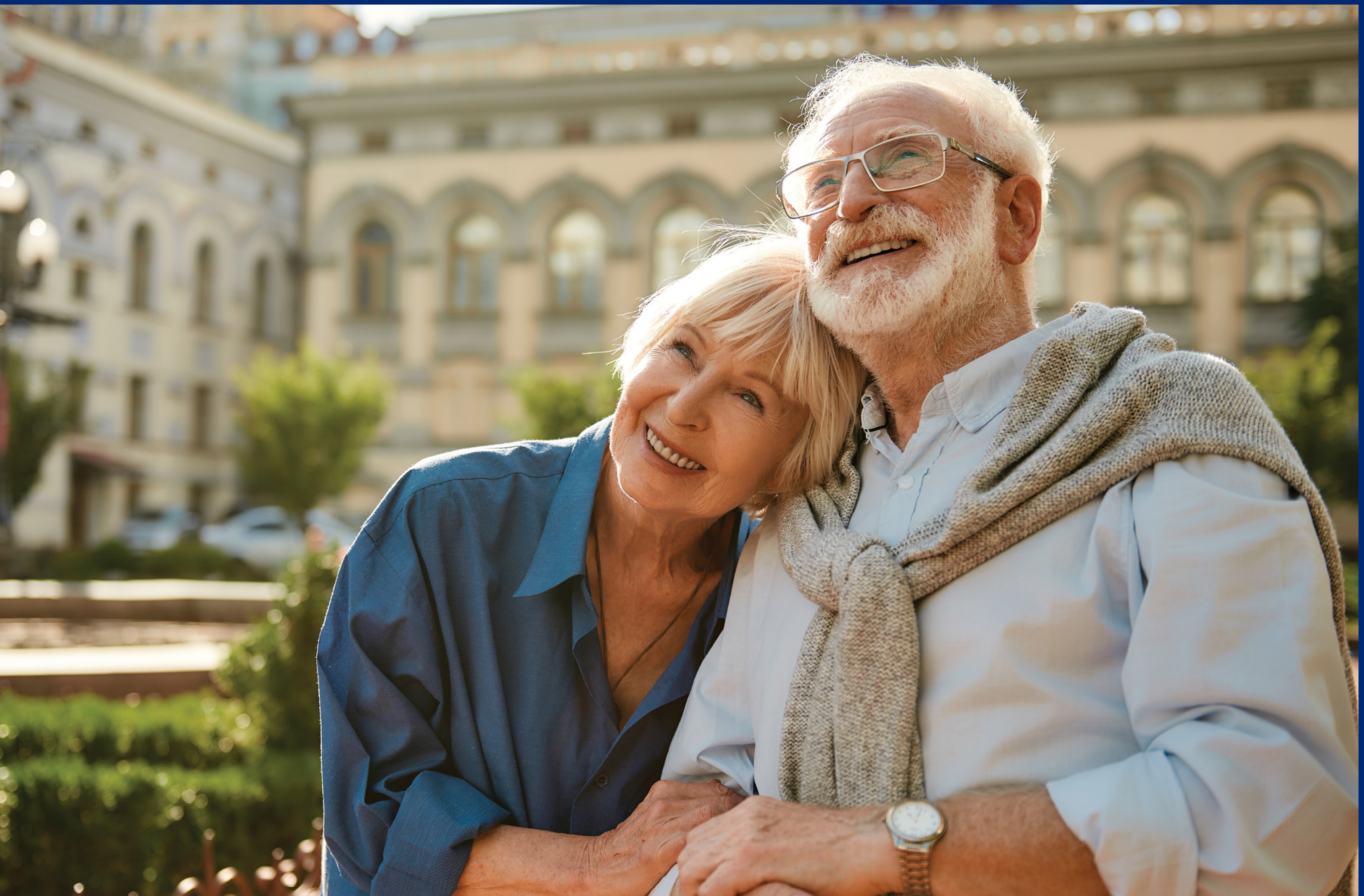
Or leaving a legacy for your children

Our investment managers can help with all of the above, and more. And if you're worried about where your money will be invested, we have sustainable and ethical options for you too.

Who is our BPS suitable for?

Our BPS is available to individuals with a minimum investment of £250,000. Its customisable nature ensures the solution can be tailored to meet diverse needs, making it suitable for a wide range of investors. It is particularly well-suited for those:

- Seeking expert assistance in achieving their personal financial objectives
- Managing complex tax circumstances or navigating financial goals
- Requiring specific investment preferences, such as legacy assets or ethical and sustainable inclusions or exclusions



Why Brooks Macdonald?

We build trusted relationships

For over 30 years, Brooks Macdonald has been helping individuals like you plan for their financial futures. Our long-term relationships are built on trust, shared values, and a commitment to your success.

Investment expertise you can rely on

Our Bespoke Portfolio managers draw on the full expertise of Brooks Macdonald to create a clear and straightforward financial plan tailored to you. With a holistic approach designed to make your money work harder, you can focus on what truly matters.

Enjoy a high level of care and attention with a dedicated investment manager who truly understands your needs and goals, ensuring a tailored and seamless experience every step of the way.

Support for every stage of life

From growing your wealth mid-career and investing after receiving a large sum, to managing your pension for a fulfilling retirement or creating a meaningful legacy for the next generation, we'll be with you every step of the way.

A plan as unique as you are

We believe your financial plan should reflect your life, your values, and your aspirations. That's why we take the time to understand what truly matters to you, creating a solution tailored to your needs and goals. With Brooks Macdonald, you're not just managing your wealth – you're shaping the life you want to live.

Find out more

To find out more about our Bespoke Portfolio Service, speak to your financial adviser for further information.

Important information

BM