INVESTMENT PARTNER

Redmayne Bentley

Company profile

We specialise in personal investment management and stockbroking services. With offices across the UK, we are accessible and ideally positioned to provide individuals, families, trusts and charities with the same level of service that has been synonymous with our firm for over 145 years. Established in 1875, our business has gone from strength to strength while remaining independently owned because we are genuinely focused on our clients, developing the best possible solutions and providing them with the highest of service standards.

Our established office network consists of over 25 locations across the UK, allowing our advisers and investment managers to treat clients as individuals at a local level, providing a truly personal service.

Why select Redmayne Bentley?

Our friendly and personal service has repeatedly been recognised with quality service awards from the City of London Wealth Management Awards, and the *Investors Chronicle* and *Financial Times* Investment and Wealth Management Awards.

We have received awards for both outstanding individual achievement and exceptional customer service, with nominations submitted by our clients.

In November 2022 we were named Wealth Manager of the Year, Stockbroker of the Year, Self-Select ISA of the Year and Investor Champion of the Year at the Investors' Chronicle and Financial Times Celebration of Investment Awards.

Levels of service

We offer a range of services; discretionary services - whereby we manage the portfolio, making decisions on behalf of clients, advisory services - whereby we provide clients with advice for managing a portfolio, stockbroking services - both execution only and dealing with advice. Our investment managers and stockbrokers offer a specialist service to cater to your investment needs. We do not provide advice on life assurance and other financial planning products; therefore, we are recognised by the FCA as a restricted advice firm.

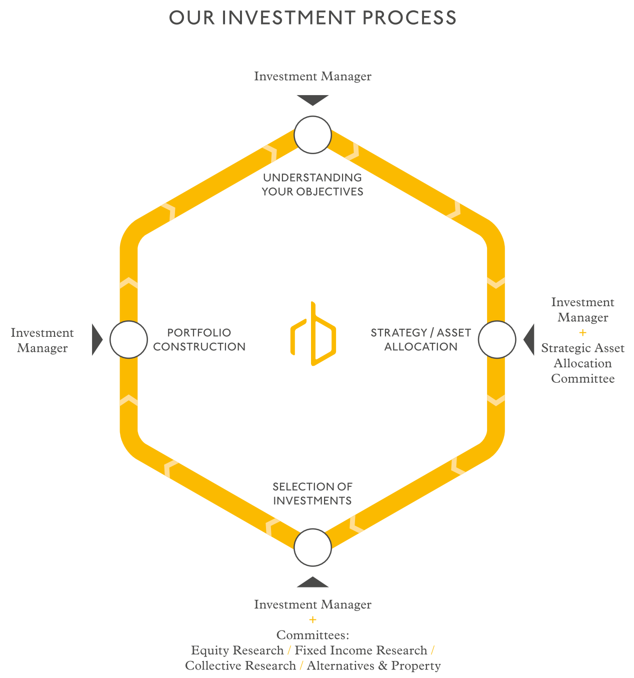
- Personal service is our key benefit – clients and their advisers using the advisory or discretionary services will have direct access to the investment manager looking after their fund. Portfolios are tailored to suit the individual's requirements and the maturity of the pension fund.
- We can offer a service that adapts as the fund passes through its early contributory stages and into maturity and income drawdown with our discretionary and advisory services.
- All portfolios can be viewed online, enabling you and/or your adviser to monitor your fund as often as you like.

Tax treatment depends on the specific circumstances of each individual and may be subject to change in the future.

Please remember investments and income arising from them can fall in value and you may lose some or all the amount you have invested.

If you require guidance with investment decisions or wish to place the management of your portfolio in expert hands, please contact us on **0113 243 6941** or visit your local Redmayne Bentley office to discuss the suitability of our services and products.

Investment process



Our investment process is centred around, and starts with, understanding the client's investment objectives, appetite for risk, capacity for loss and investment horizon.

Once this has been established and agreed with the client, an appropriate measure will be selected for the portfolio mandate. The investment manager will then consider the overall strategy and asset allocation in conjunction with our Strategic Asset Allocation Committee.

The investment manager will select individual investments with reference to the guidance set out by our individual asset class committees. These committees are Equity Research, Collectives Research, Fixed Income Research, Alternatives & Property Research and ESG.

Once the investments have been established, the portfolio will then be constructed, ensuring at all times that it is suitable for the agreed mandate.

Charges

Please refer to our *Schedule of Charges* and *Terms of Business* on our website redmayne.co.uk/terms.

Adviser charges may be paid out of your SIPP cash account by AJ Bell Investcentre. In addition, your financial adviser may receive initial and ongoing payments from Redmayne Bentley. Your adviser can provide you with further details.

AJ Bell Investcentre will not accept investment instructions - these must be arranged directly with Redmayne Bentley.

Your adviser is responsible for transferring cash between AJ Bell Investcentre and Redmayne Bentley. Your adviser must transfer cash using AJ Bell Investcentre's online cash movement facility.

Contact details

For further information about our investment management services, and any other general queries, please contact our Leeds head office on 0113 243 6941.

Registered address:

3 Wellington Place
Leeds
LS1 4AP

For information about your nearest Redmayne Bentley office, please visit: www.redmayne.co.uk

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Redmayne Bentley is a member of the London Stock Exchange and is authorised and regulated by the Financial Conduct Authority.

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