Case Study Series

Fundamental

Adviser looking to manage clients on platform

AIM portfolios were traditionally held directly with a specialist AIM investment manager. However, many wrap platforms can now accommodate not only AIM shares but AIM managers who can manage AIM client portfolios on behalf of your clients via a DFM mandate. This allows client assets to remain on your chosen platform, facilitating the seamless outsourcing to a specialist AIM manager and avoiding unnecessary and time consuming administration.

Our Fundamental AIM IHT ISA Accounts and General Investment Accounts are tailored discretionary arrangements which can be accessed on a large number of platforms.

Speak to your relationship contact below to hear more.

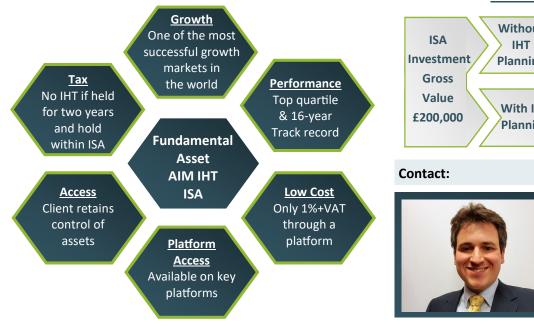
FOR INVESTMENT PROFESSIONALS ONLY

FACT!

AIM portfolios are not only available direct but can be managed via platform reducing your administration and saving you time

We are available on the following platforms:

FundsNetwork Inucleus transaction take control ascentric INVESTOR Investor



The Importance of IHT Planning



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IMPORTANT INFORMATION

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