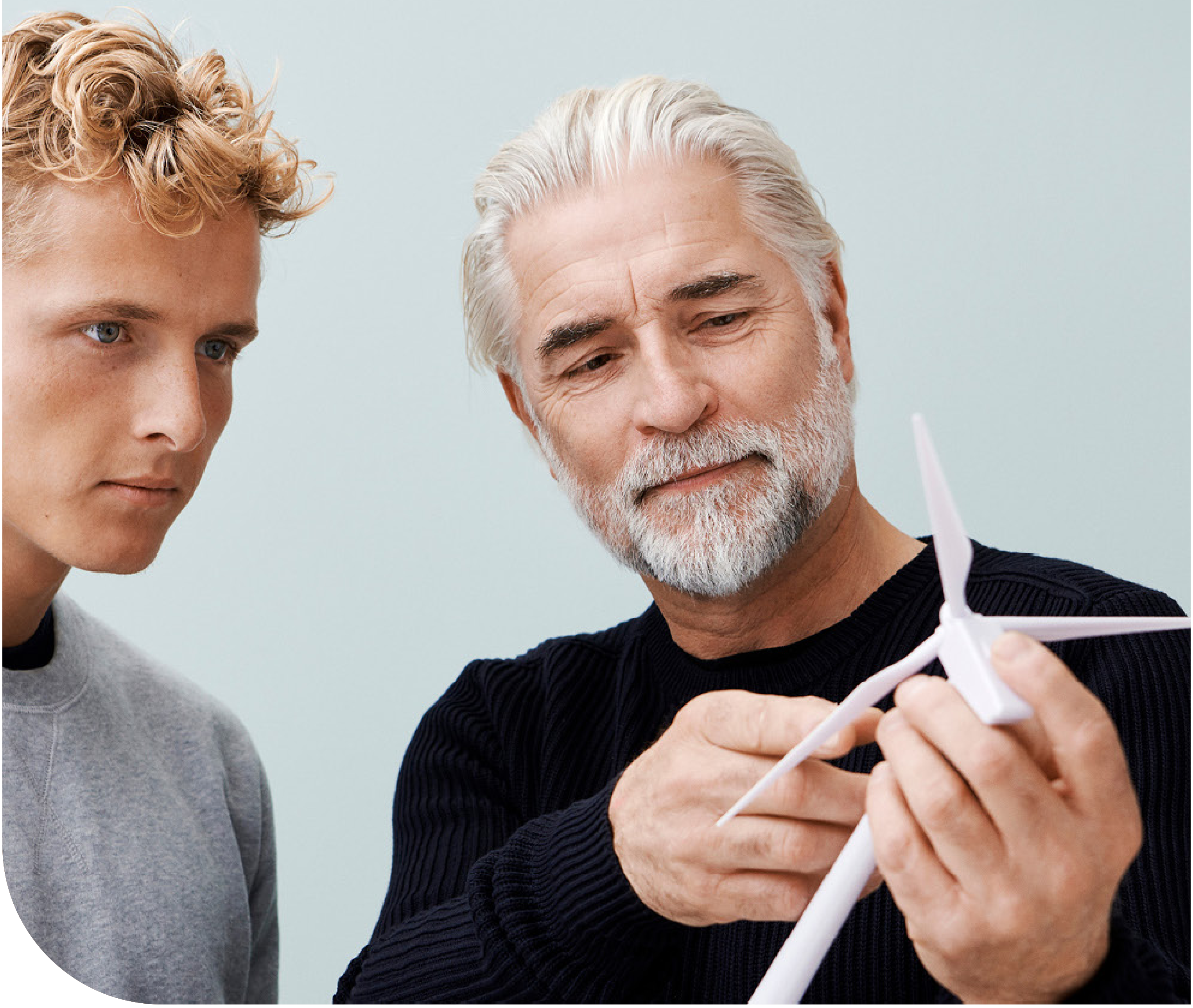
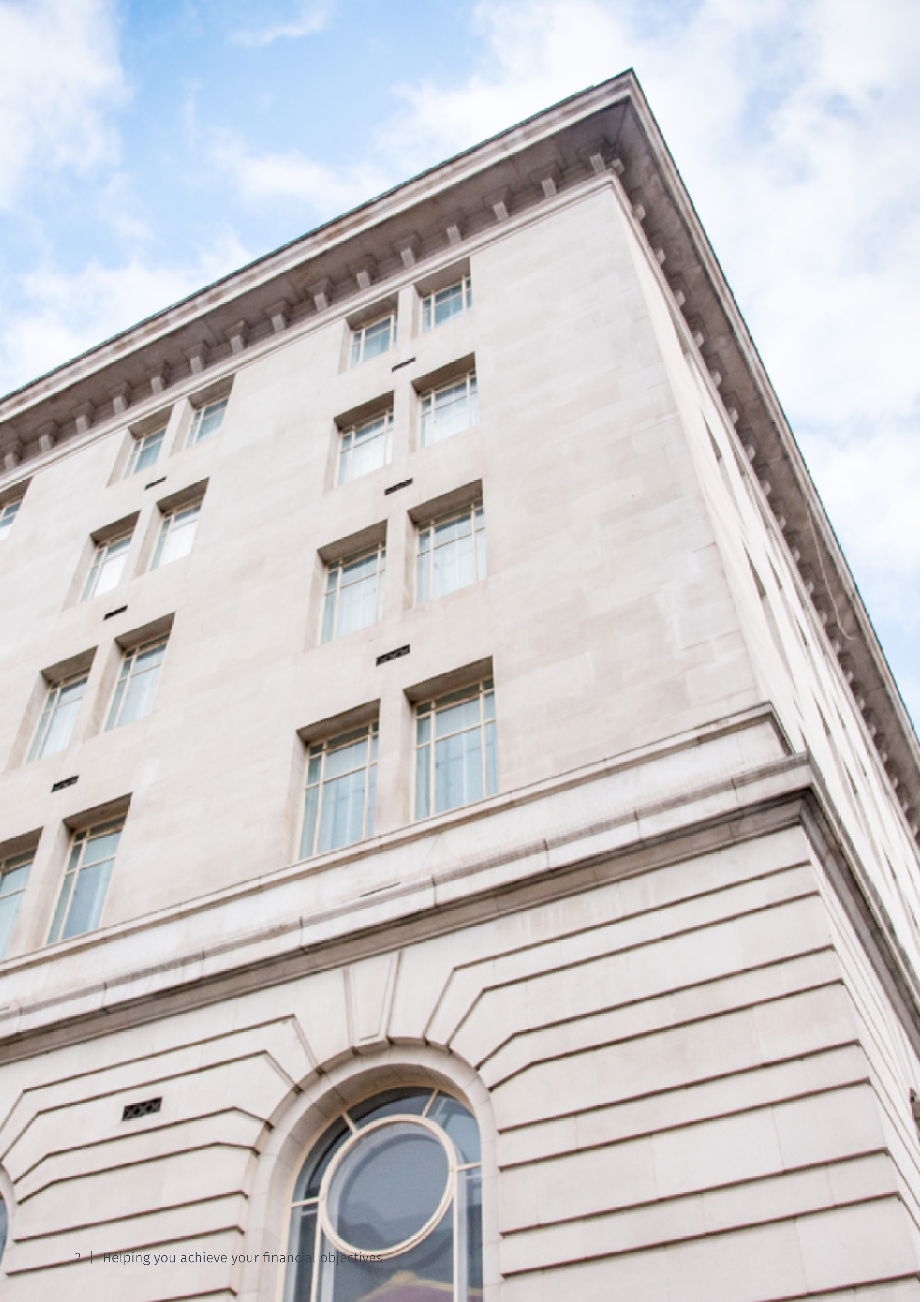
EFG Harris Allday

Helping you achieve your financial objectives





Welcome to EFG Harris Allday

We have been managing money for almost 200 years. Our aim is to preserve and grow our clients' wealth, giving you peace of mind about your financial future. We work hard to get to know you and your family and deliver a tailored solution to meet your long-term objectives.

Our talented and long-established investment teams are based in Birmingham, London, Ombersley and Shrewsbury. Our team aim to deliver consistently high levels of service and results for clients across the UK.

Our stockbroking origins can be traced back to 1834 in Birmingham, where our Head office remains today in the former Birmingham Stock Exchange Building. Our reputation has built rapidly throughout the years as we have continued to help our clients achieve their financial objectives, offering them the highest standards of personal service and leading them to recommend us to their friends and family.

Many clients are introduced to us through referrals from national and regional accountants and solicitors, as well as financial advisers. We welcome the opportunity to work in partnership with external advisers.

EFG Harris Allday is the investment management division of EFG Private Bank Limited, a subsidiary of EFG International. EFG International is a global banking group, publicly listed on the Swiss stock exchange.

Our people

Our clients' portfolios are managed by a team of experienced Investment Managers, with access to an internal research team who provide analysis on both UK and International funds and equities.

Our experience has enabled us to successfully guide clients through ever changing financial markets. We believe that strong, personal relationships are at the heart of investment management. At EFG Harris Allday our aim is to preserve and grow our clients' wealth, giving you peace of mind about your financial future.

How can we help you?

At EFG Harris Allday we manage investments for many types of client, from individuals to charities, pension funds and trusts. We use a central investment process and our own research and analysis to support our investment managers.

Our investment experts have valuable experience and understanding of financial markets, combined with a strong focus on providing a friendly, straightforward, and personalised service.

Whether our clients are seeking long term growth, an income later in life, or to pass their wealth to future generations, our teams are here to help. We manage bespoke investment solutions that are tailored to your individual preferences.

Your Investment Manager will meet with you to discuss your personal objectives. We will create a bespoke strategy in line with your attitude to risk and investment time horizon. We consider whether you need an income from your portfolio or if you are happy for it to grow, and whether any fall in the value of your investments in the case of market volatility would have a detrimental effect on your lifestyle.

We are able to adapt our personal service to suit you. Whether you would prefer a face-to-face meeting, or a virtual call to fit around your routine, we will ensure that you always receive your preferred choice of ongoing communication.

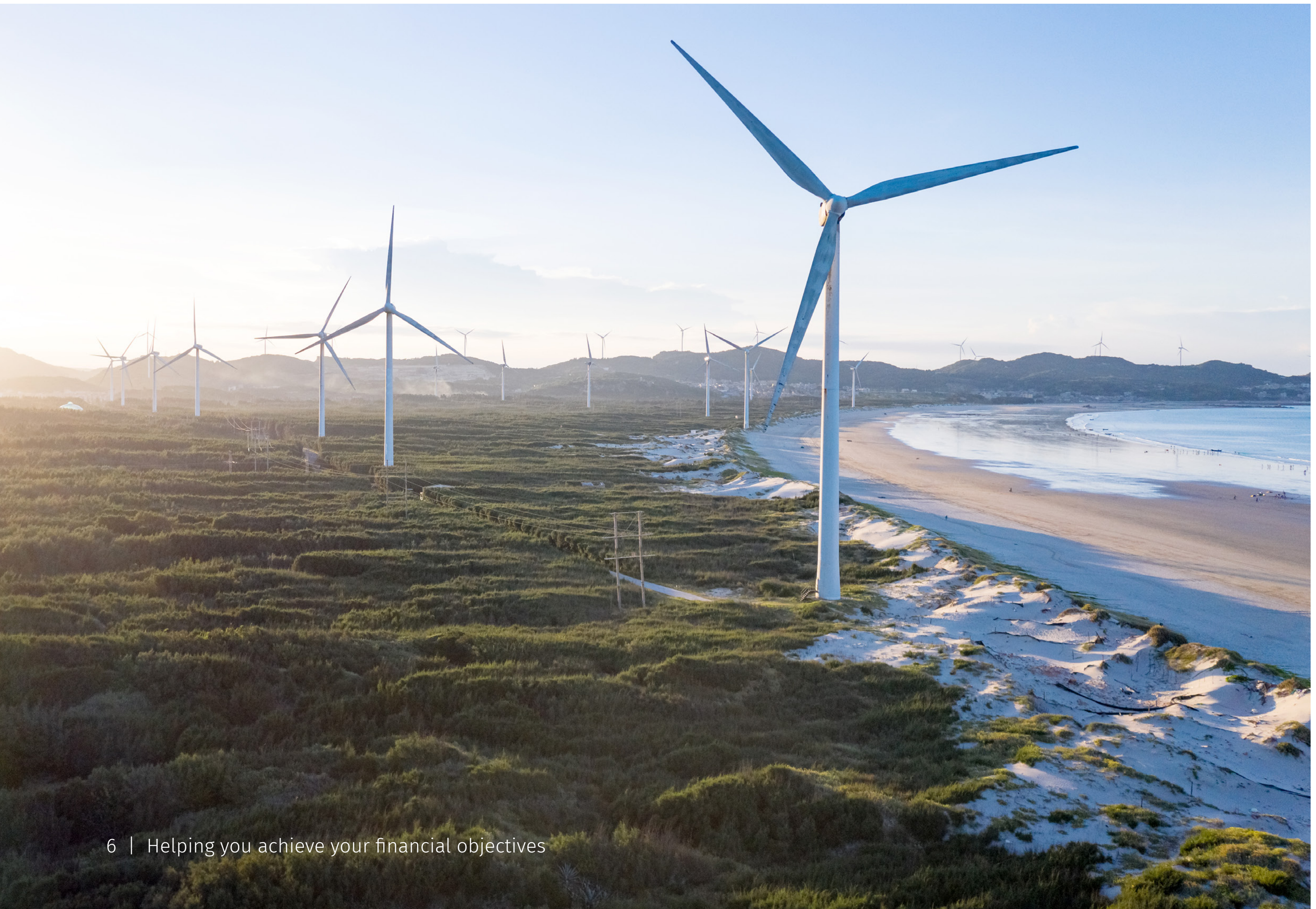
We are happy to work in conjunction with other professionals including your Financial Adviser, Accountant, Tax Adviser and Solicitor, forming a network of experts to support your needs.

Investment process

At EFG Harris Allday, the investment process is overseen by our in-house investment committee, made up of experienced members of both the research and the management team.

Our investment process is designed to deliver outcomes in line with your objectives, whilst providing support at every life stage. We deliver a bespoke, active management service, utilising a wide range of asset classes for portfolio construction.

Our team of skilled research analysts undertake due diligence across a broad range of investments. The team deliver a recommended list of core investments, deemed to be what we believe to be the best-in-class funds and companies. Recommendations are put forward to the investment selection committee and discussed by the investment committee on a quarterly basis.



Investment solutions

We understand that clients have individual goals and varying levels of experience when it comes to investing. With our bespoke service, your Investment Manager will create a diverse portfolio and monitor the performance of your investments on an ongoing basis.

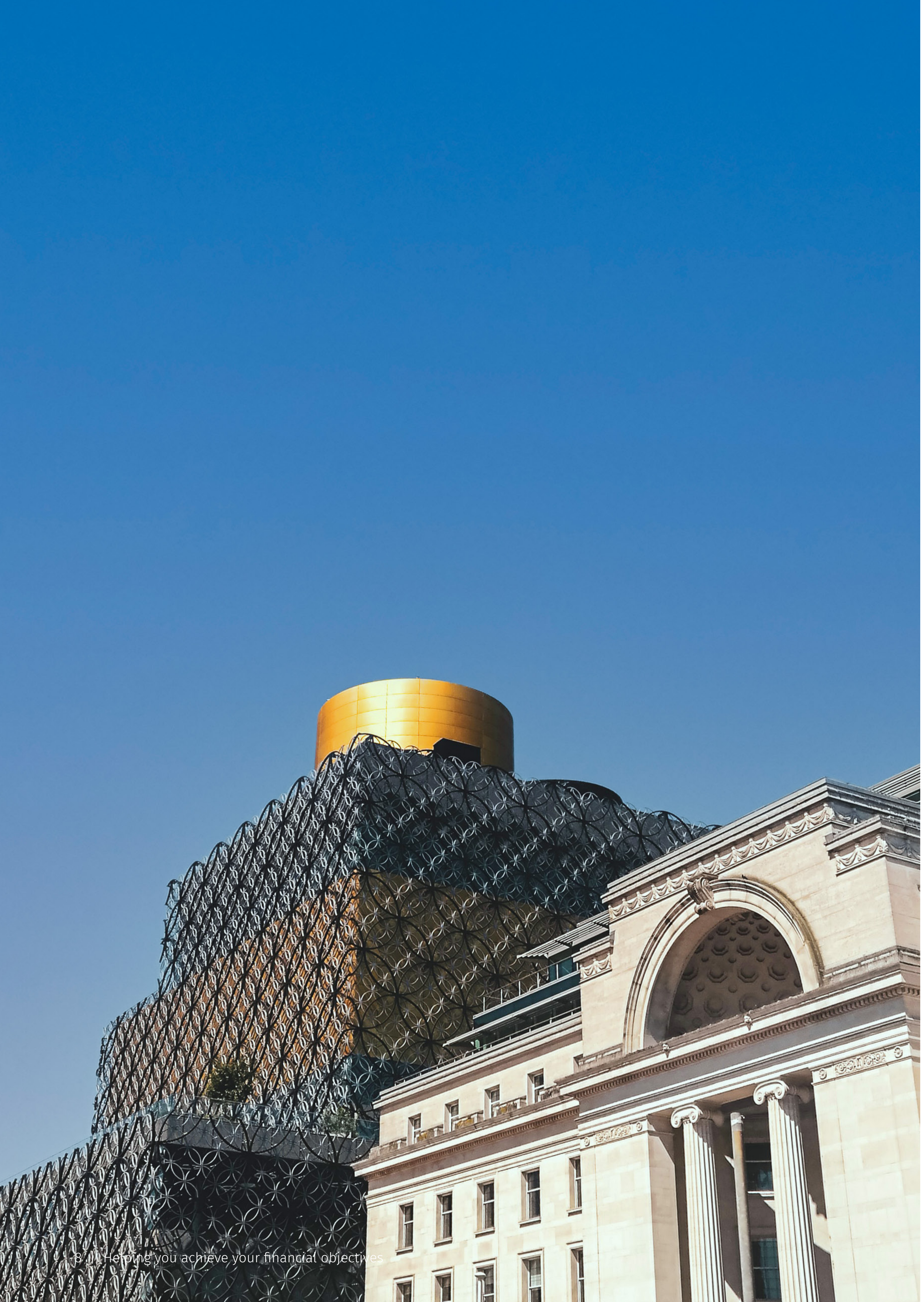
Discretionary Investment Management Service – your Investment Manager will undertake the day-to-day management of your portfolio, making decisions in line with your strategic objectives.

Advisory Investment Management Service – we will advise you on your investments and manage your portfolio to agreed guidelines. You will be in control of the final decision when it comes to buying or selling individual assets.

Portfolio management is our core service to support your investment needs, however if you are an experienced investment professional, we also offer the ability to manage your own investments via our Execution Only Service.

We can provide a range of specialist custom investment solutions dependent upon your needs. These include Charity and Trust Portfolios. Additionally, via EFG Private Bank, we can offer Banking Services and Portfolio Loans.

Although we do not offer tax advice, we are able to use 'Wrappers' to give investments a level of protection from tax. These include ISAs, SIPPs and Offshore Bonds.



The right service for you

We understand that clients have individual goals. We provide a choice of investment services, all with a dedicated Investment Manager, who manages the investments on an ongoing basis.

Discretionary Investment Management Service
A bespoke service where the portfolio is managed on your behalf by an Investment Manager following an agreed strategy.

Advisory Investment Management Service
We advise you on your investments and manage your portfolio to agreed guidelines, you make the final decision on buying or selling individual assets.

Advisory Dealing Service
We offer recommendations on investments, but do not manage the portfolio, you make the investment decisions.

Execution Only Service
You manage your portfolio of investments, and we implement your decisions.

Reporting

All clients can review their investment portfolios through our client portal.

Additionally, you will receive a detailed quarterly valuation. You can speak to the team who manage your money at any time. We will also send an informative client newsletter every six months, containing key updates at EFG Harris Allday.

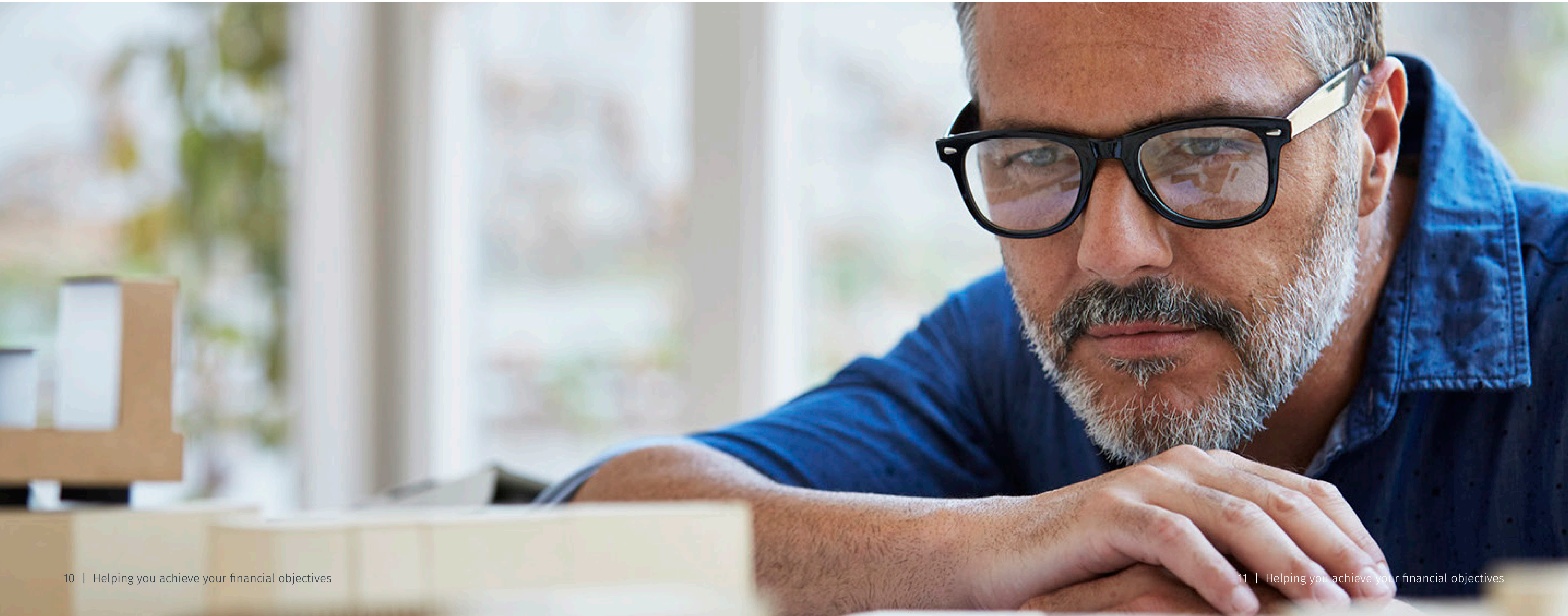
You can also access our market updates, featuring macroeconomic views and global insights, which can be found on our website.

Security of assets

Client assets held within our portfolio management services are held within our comprehensive in-house custody service, utilising EFG Harris Allday nominee. They are ring fenced from EFG Harris Allday balance sheet according to FCA rules.

Our parent company is publicly listed in Switzerland and is one of the largest Swiss Private Banks.

EFG Harris Allday can support you to ensure that your investment needs are met. We would be delighted to discuss these with you in more detail. Please contact us for more information.



Our offices

We support a range of clients across the UK. Please get in touch to find out more about how we can help you. Call us on 0121 233 1222 or speak to your contact in your local office.

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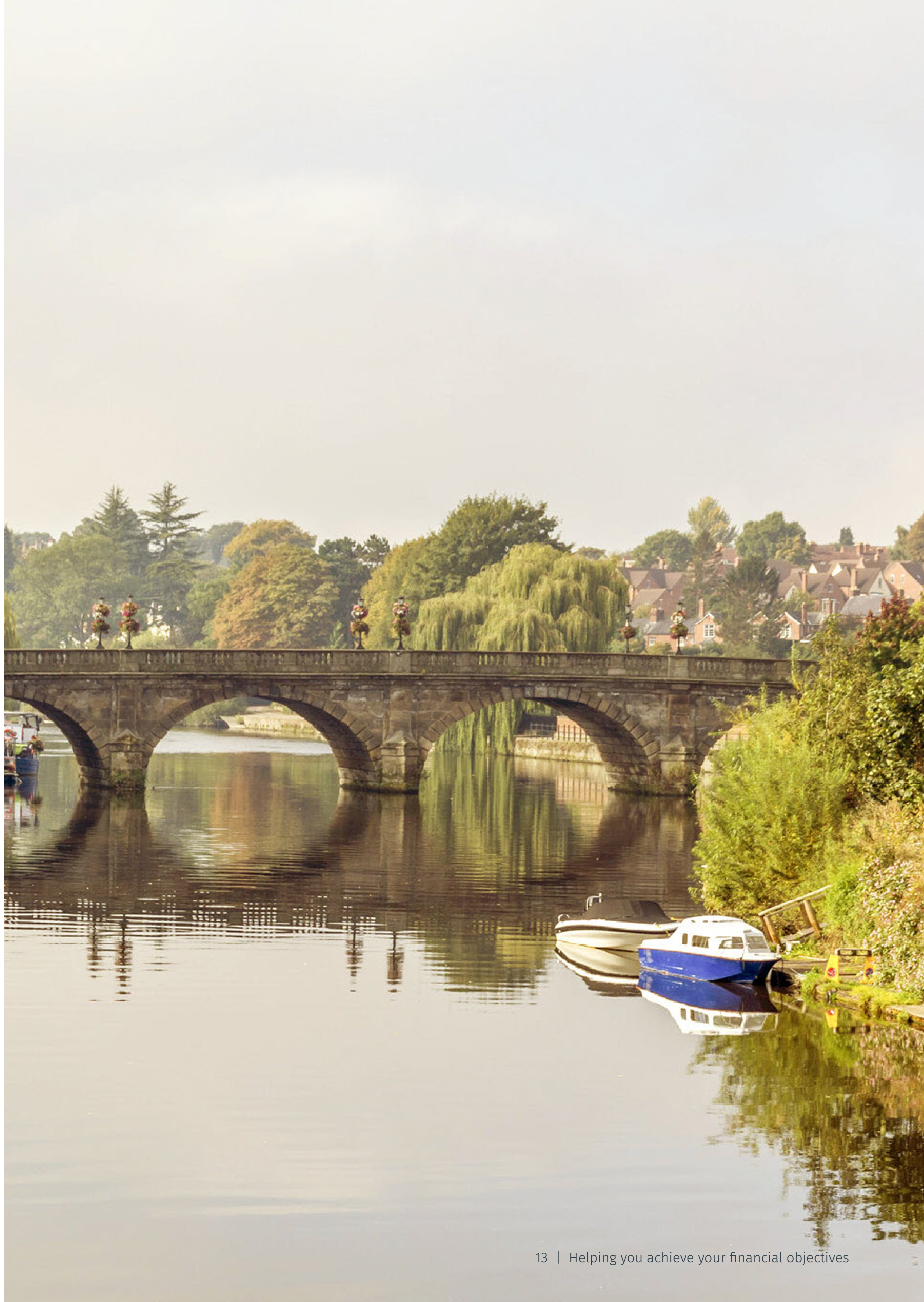
efgha.com

Follow us on LinkedIn and stay up to date with our latest news and insights.



Important information

IBIM10657 January 2023