eQ investors

Investing made easy

Get started today

Who we are

We're EQ Investors: an award winning firm of investment managers and Chartered Financial Planners based in London. We're a staff owned business and one of the UK's founding B Corporations.

FINANCIAL PLANNERS CII CHARTERED

> ***Admirably level-headed fund managers***
>
> Anthony Hilton, The Evening Standard

Certified B Corporation

How it works

Investing with EQ is as easy as 1-2-3...

Speak to an investment adviser:

020 7448 7171

1 We get to know you

It's super-convenient. Speak to us over the phone or via Skype, or pop into the office for a chat. We'll take you through a series of questions to learn about your investment goals and circumstances. If you prefer, you can complete our investment questionnaires online.

2 We make a recommendation

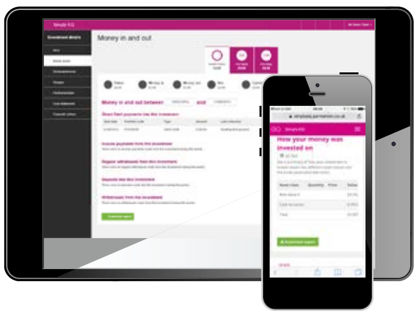
Every investor is different. We'll help you choose an investment strategy that's right for you. We're qualified financial advisers. We'll let you know whether you're on track to meet your goals, and also make sure that you're not risking more than you can afford.

3 We invest for you

Our team of investment professionals will build a portfolio for you and manage it on your behalf. You'll never have to worry about what markets are doing, or when to buy or sell. You can check how your investments are doing, online 24/7. You can talk to us whenever you like, and we'll review your strategy every year.

- ✓ You can open a tax-free **Individual Savings Account (ISA)**, a **Junior ISA** (on behalf of a child), a **personal pension** or a general investment account. We can also help you transfer an existing ISA, pension, or other investments across to our managed service.
- ✓ The minimum initial investment is £1,000 or a regular monthly contribution of £250.
- ✓ You can log in to monitor the performance of your portfolio online, and our team of investment advisers are never more than a phone call away.

> ***Straightforward and logical. A joy to use!***
>
> Miss F. C., EQ Client



What you get

A portfolio of investments is sensible for most investors, because it's not wise to put all your eggs in one basket. You can choose an approach below that suits your style as an investor. Our team will then build a portfolio of funds and manage it carefully for you.

Best Ideas

Our signature portfolios invest in the very best ideas unearthed by our research team. This includes both specialist, actively managed funds and passive tracker funds, with an overall aim of beating the market.

Positive Impact

These portfolios postively screen for social and environmental impact. They have been a great success since their launch in 2013, in line with growing evidence that companies run in a sustainable and responsible manner generate higher returns.

Income

These portfolios aim to produce an income of at least 3% per year, while also offering the potential for capital growth. They invest in equities, bonds, commercial property and alternatives. They are the newest addition to our range of model portfolios.

Low Cost

These portfolios invest through low cost tracker funds. There is a school of thought that investment markets are so efficient that it is impossible to beat them consistently. Therefore, it makes sense to track the markets and keep costs as low as possible.

The EQ Approach

As professional investors we will take great care in building and managing your portfolio. Here are the key features of our approach:

- ✓ Investment always involves some risk with the aim of generating a return. We will make sure your portfolio reflects the right level of risk for you.
- ✓ To keep your portfolio well-balanced we always invest across the broadest range of asset types possible (including equities, bonds, property, commodities, alternatives and cash).
- ✓ We invest exclusively through funds. By working with the top fund managers around the world we can harness their expertise to access the very best oppotunities in any sector or region.

Risk warning: past performance is not a guide to future performance. The value of investments and the income derived from them can go down as well as up, so you could get back less than you originally invested.

Value for money

We charge a single annual fee that reduces the more you invest:

Your portfolio	Up to £99,999	£100,000 –£249,999	£250,000 –£499,999	£500,000 –£999,999	£1million+	Fund charges*
Low Cost Portfolios	0.99%	0.79%	0.69%	0.59%	0.49%	0.15%
Other Portfolios	1.19%	0.99%	0.79%	0.69%	0.59%	0.7–0.8%

Charges listed are per annum, include VAT where applicable, and are applied to the entire portfolio value.
No initial or exit fees. No transaction or wrapper charges. No charge for annual tax statements.
*Fund charges are indicative and will vary based on the specific funds in your portfolio.

Want more?

We're a fully fledged advisory firm. Our team are specialists in:

- Tax planning
- Estate planning and inheritance tax
- Final salary pensions
- Venture Capital Trusts
- Enterprise Investment Schemes
- Crowd Bonds

As your wealth grows and your planning needs become more complex, we'll be with you every step of the way.

EQ Investors, Centennium House, 100 Lower Thames Street, London EC3R 6DL

eqinvestors.co.uk | 020 7488 7110 | enquiries@eqinvestors.co.uk | @eqinvestors | EQ Investors