



investors

Introducing EQ

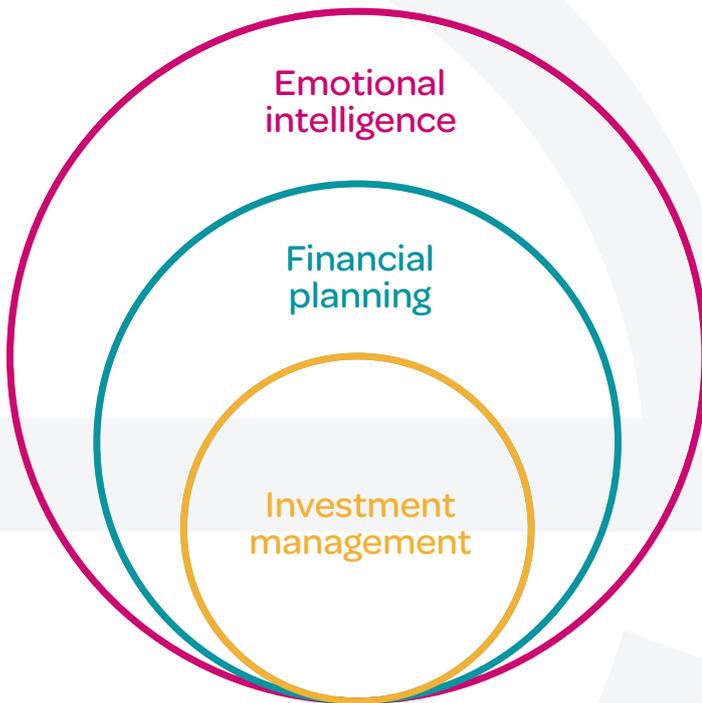


How can we help?

Welcome to EQ

Who we are

EQ is a staff-owned chartered financial planning firm that offers a full range of life planning and financial advisory services for individuals, families, trustees, attorneys, directors and business owners. We have a top class investment team, delivering market-beating performance as well as specialist options for clients who care about how their money is invested. Our ethical approach to doing business has won us the favour of clients across the UK.



1 EQ stands for emotional quotient – a measure of our ability to recognise other’s emotions. Our aim is to help you plan for your future by getting to know you and what you care about most. So we’ll start by listening.

2 A financial plan is there to give you confidence in your future. As planners we’ll work with you to make sure that your finances are set up to support your life choices.

3 Every investor is different so we offer a range of investment strategies to suit different individuals, as well as model and bespoke approaches to suit portfolios of all sizes.

Meet the team at eqinvestors.co.uk



Our values



We are one of the UK's founding B Corporations and are fully committed to using business as a force for good.

B Corporations represent the gold standard for ethical business: we assess our operations in view of all our stakeholders: clients, employees, suppliers, the communities where we operate, and our impact on the physical environment. We are committed to measuring and improving our impact in all these areas on a continual basis.

As an employee-owned firm, our staff are also our shareholders, aligning our interests fully with those of our clients.

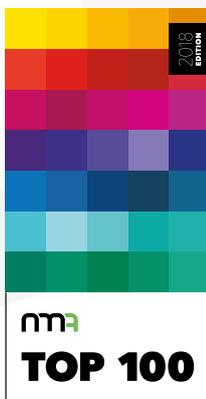


EQ Investors is a firm of Chartered Financial Planners, the highest level of professional accreditation available in the UK.

Our corporate chartered title shows our commitment to an overall standard of excellence and professionalism, and means that:

- our financial advice is of the highest quality
- our advisers adhere to strict professional ethics and standards
- we only make recommendations based on research into consumer needs

Our chartered status is renewed every year, involving an independent compliance audit of our financial planning practice.



We've won numerous awards for our work.

Each year New Model Adviser magazine, published by Citywire produces a list of the top 100 advisory firms to showcase financial planning firms that are at the 'top of their game'. We're grateful to see that our commitment to our clients and the wider community has been recognised by Citywire, one of the most respected, independent financial publishers in the UK.

We've also won awards for our discretionary fund management service, and our groundbreaking work around impact investing.

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. You could get back less than you originally invested.

Planning with EQ

We make money make sense

What do I need to save? How can I protect my family? What will my retirement look like? Can I help my kids get on the property ladder? These are the kind of questions that we get asked every day. Our financial planners are trained to sit down with you to explore your needs and priorities – whatever they may be – and then to help you turn that initial conversation in to a fully-fledged financial plan.

We can provide a full spectrum of financial planning services, including:



Financial life planning and cash flow modelling



Family and business protection



Specialist advice on pension transfers, options at retirement, tax planning, trust and estate planning



Working in partnership with legal and other financial professionals



Investment management services for individuals, pension schemes and charities



Corporate advice including workplace pensions, risk benefits and employee benefits



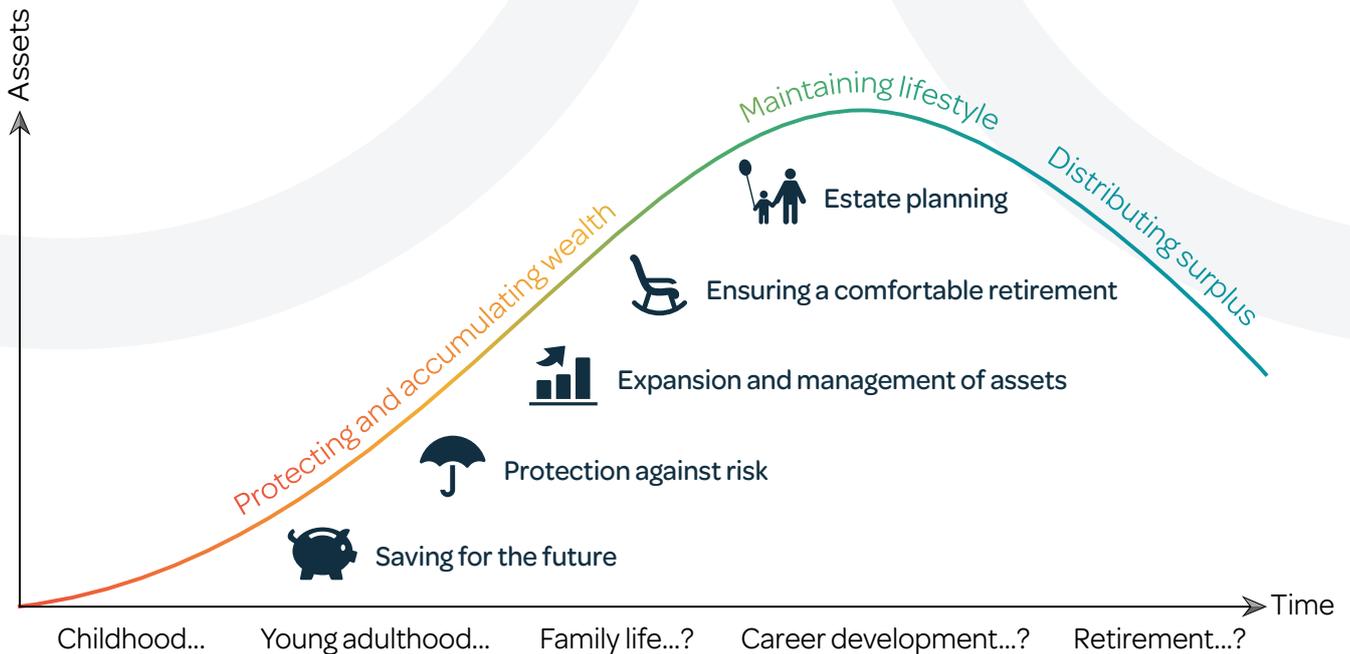
Impact investing and reporting



Up-to-date information on important issues that may affect your wealth

Start from where you are

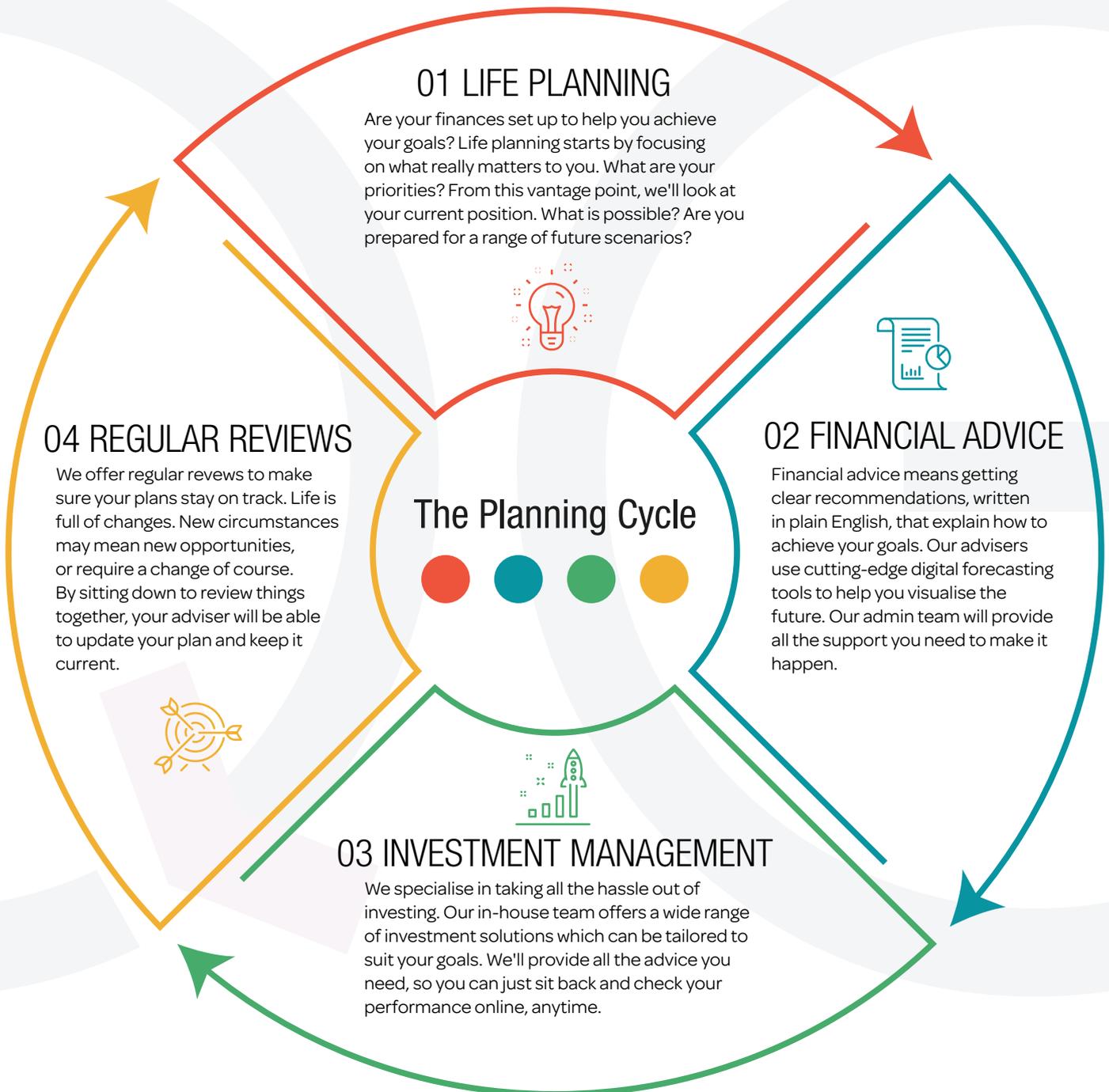
What we want from life and from our money can naturally change as we get older. When we're young we may be focused on accumulating wealth and planning for the future; as we approach retirement a whole new set of choices and questions arise. At EQ, we'll work with you to understand what's most important in your life today, and then help you to think through possible future scenarios.



Making sure you stay on track

We can meet with you regularly to see how things are going, and to check if anything has changed. If we're meeting for the first time – or if changes are required – then our advice will take the form of a clear set of recommendations which we can help you implement.

At EQ we see financial planning and investment management as working hand in hand to help you achieve your goals. Our in-house investment team provide regular updates on how your portfolio is performing, and what we are doing in response to world events.



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Investing with EQ

We make investing easy

- ✓ We'll advise you on how and where to invest, and how much investment risk to take
- ✓ We'll build and manage your portfolio on your behalf
- ✓ You can choose from a range of investment approaches
- ✓ You can log in anytime to check how your investments are doing
- ✓ For larger portfolios we offer a fully bespoke service.

Model portfolios

A portfolio of investments is sensible for most investors, because it's not wise to put all your eggs in one basket. Our model portfolio service offers a choice of three investment solutions. Our advisers will work with you to understand your investment goals and help you to choose the right one for you. Your portfolio will also have an appropriate risk profile that reflects your needs and objectives.

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 invest in companies providing solutions to social and environmental problems, in line with growing evidence that companies run in a sustainable and responsible manner generate higher returns.



Low Cost

These portfolios invest through low cost tracker funds. There is a view that investment markets are so efficient that you just can't beat them consistently, so it makes sense to track the markets and keep costs as low as possible.



Bespoke service

For clients with larger portfolios or more complex circumstances we offer a bespoke investment management solution.

This is designed for clients with over £750,000 to invest. In addition to your financial planner you will have a dedicated investment manager who will always be available to discuss your current investment strategy and past performance.

The benefits of our bespoke service include an individually tax optimised portfolio and access to a wider range of investment vehicles, including investment trusts.

24/7 online access

Our market-leading client portal is easy to use, and enables you to view all your portfolio holdings in one place and analyse their performance.

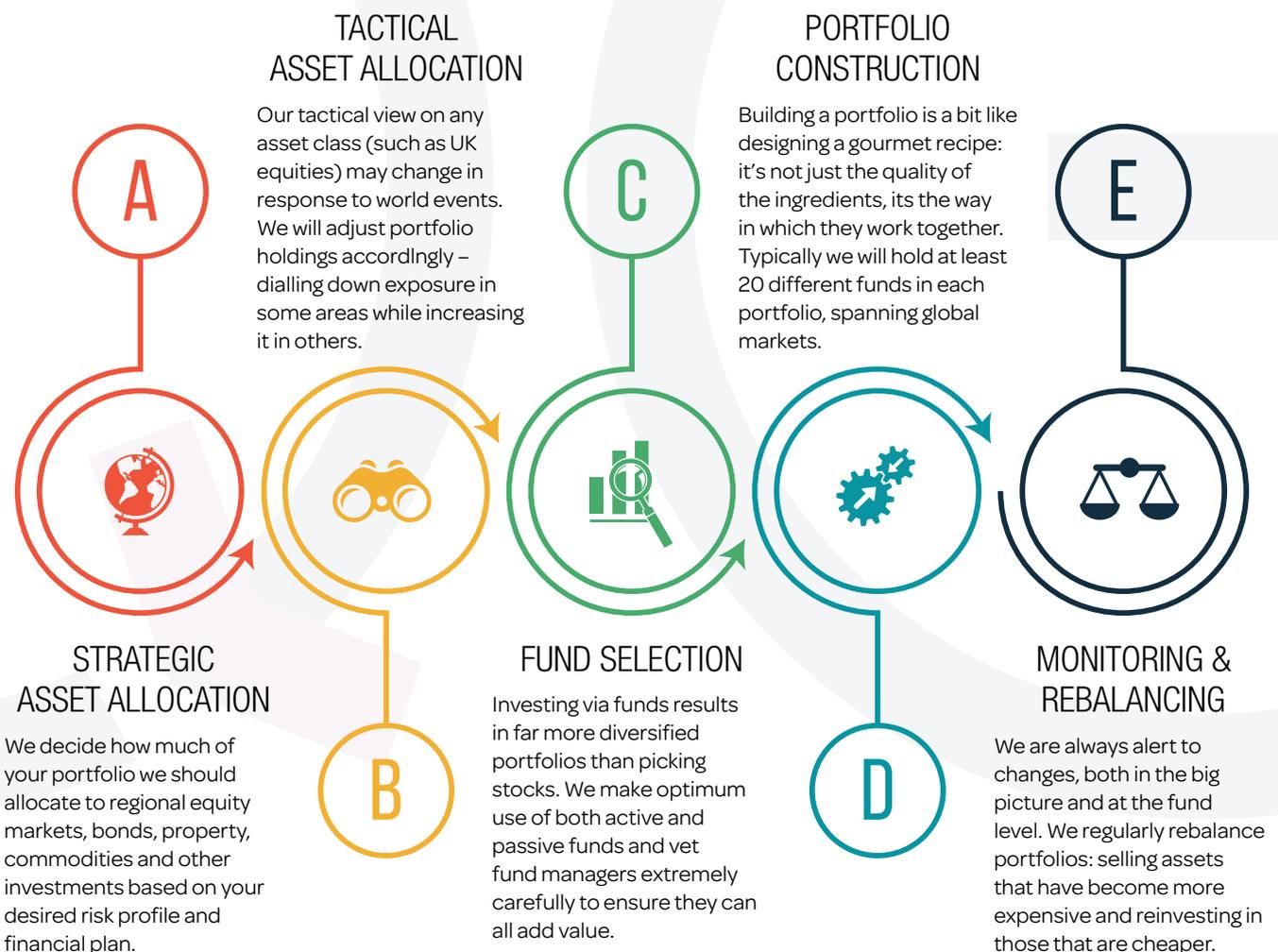
“ *Straightforward and logical.
A joy to use!* ”

Miss F. C., EQ Client



Results driven

We are proud to have an in-house team of professional investment managers with deep technical expertise and a strong track record. Our investment process is robust and we have consistently exceeded client expectations by beating our benchmarks. See for yourself at eqinvestors.co.uk/performance



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Next steps...

Invest online

Our online investment service is perfect for those who just want to invest online or over the phone without any hassle.

Financial planning

If you have any questions about your financial future, why not book a free meeting with one of our financial planners?

Bespoke investing

For those with larger portfolios our bespoke investment management team offers a fully tailored approach.

To discuss our services in more detail please contact us:



020 7488 7110



enquiries@eqinvestors.co.uk



eqinvestors.co.uk

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

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

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