

simply

EQ

Sustainable 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.



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



How it works

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

Speak to an investment adviser:

020 7448 7171

<https://eqinvestors.co.uk/book-a-meeting>

1 It's easy to get started

Our online and telephone investment service is for individuals who don't need a full financial plan. You can invest [entirely online](#) by completing our investment questionnaire. We're also happy to speak over the phone or via a video call. It's super-convenient.

2 We make a recommendation

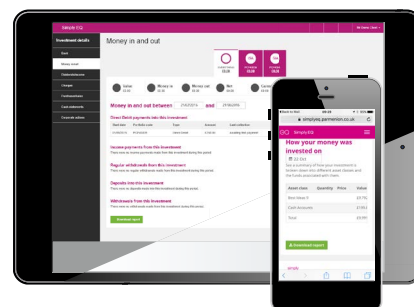
Every investor is different. We'll help you choose an investment strategy that's right for you. We're qualified financial advisers. We'll let you know whether you're on track to meet your goals, and also make sure that you're not risking more than you can afford.

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.

- ✓ With Simply EQ 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., Simply 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.

Invest to solve social and environmental challenges:

Positive Impact

Our flagship sustainable portfolios positively 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.



Other strategies available:

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.



Best Ideas

These 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.



› 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 opportunities 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 £50,000	£50,000 –£99,999	£100,000 –£249,999	£250,000 –£499,999	£500,000 –£999,999	£1million+	Fund charges*
Positive Impact	1.2%	0.99%	0.89%	0.79%	0.69%	0.59%	0.6–0.7%
Low Cost	1%	0.79%	0.69%	0.59%	0.49%	0.39%	0.1%
Best Ideas	1.2%	0.99%	0.89%	0.79%	0.69%	0.59%	0.6–0.7%

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 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 pensions and risk benefits



Impact investing and reporting



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

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