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.

Chartered Financial Planners

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

Certified B Corporation

How it works

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

Speak to an investment adviser:
020 7448 7171
eqinvestors.co.uk/book-a-meeting

1 We get to know you

These days, while our London offices are open, we're also happy to speak over the phone or via a video call. It's super-convenient. 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

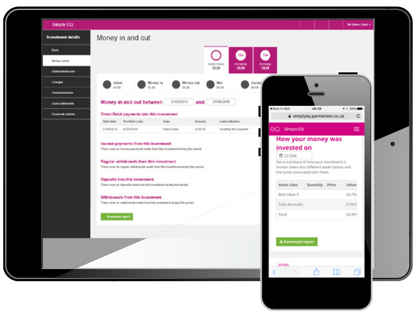
Every investor is different. We'll help you choose an investment strategy that's right for you. We're qualified financial advisers. We'll let you know whether you're on track to meet your goals, and also make sure that you're not risking more than you can afford.

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.

- ✓ 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.

#positiveimpact

Active portfolios for clients who want to maximise their impact and returns

- Diversified portfolios of active funds running dedicated impact strategies
- Invests in companies whose products and services help solve social and environmental problems
- Detailed impact reporting using environmental and social impact metrics
- Positive impact investment approach naturally avoids controversial sectors

#futureleaders

Passive portfolios for clients who want to invest sustainably at low cost

- Diversified portfolios of sustainable low cost passive funds
- Invests in companies with strong ESG (Environmental, Social & Governance) profiles
- Overweights in sustainable themes: clean energy, healthcare, green bonds
- Negative screens include: fossil fuels, armaments, gambling & tobacco

Not sure which one to pick? Give us a call on **020 7488 7171** and we'll be happy to talk you through the options.

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*
Positive Impact	1.19%	0.99%	0.79%	0.69%	0.66%	~0.6%
Future Leaders	0.99%	0.79%	0.69%	0.59%	0.49%	~0.25%

Rates are annual charges applied to your entire portfolio value (charges are not tiered) and include VAT.
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 workplace pensions, risk benefits and employee benefits
- Impact investing and reporting
- Up-to-date information on important issues that may affect your wealth

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