


 The logo for Rensburg Sheppards features the company name in a white serif font, overlaid on a background of abstract, swirling patterns in shades of purple, blue, and white, resembling marbled paper or stone.

**Investment Solutions for  
Professional Advisers**

Investment Management

## About Rensburg Sheppards Investment Management Limited

- Rensburg Sheppards Investment Management Limited is a major subsidiary of Rensburg Sheppards plc, a public company whose shares are quoted on the London Stock Exchange.
- Our main business is Investment Management and we currently look after £11.5 billion\* of funds for our clients.
- We pride ourselves on providing a personal service tailored to our clients' requirements.

## How we can help you and your clients

There is a greater choice of financial products and services than ever before and investors are presented with a vast and perplexing range of investment opportunities. This is where Rensburg Sheppards can help you as we have a long history of working with other professional advisers.

### Our Aim

Our objective is to assist professional advisers to meet the growing investment sophistication of clients and their demands for a highly personalised service. This allows you to offer a high level of technical and administrative expertise to your clients without losing control of their affairs. We aim to offer a strong support network from our office to compliment your client relationship skills.

### Our Services

Rensburg Sheppards offer a number of discretionary and advisory managed services designed to ensure that clients achieve their financial objectives and preserve and enhance their wealth with an appropriate and agreed degree of risk management and returns.

### Portfolio Management Service

We undertake a comprehensive review of a client's financial affairs and we will work closely with you to devise the most appropriate strategy which meets the clients' investment requirements.

### ISAs

These are tax-efficient products that are free of capital gains tax and represent an integral part of most clients' investment portfolios.

### Estates Administration

Administering an Estate can be a complex and time consuming exercise but this service is simple, efficient, cost-effective and can reduce the workload for professional advisers.

## SIPPs

SIPPs offer valuable tax concessions and give you greater choice of investment structure within your Plan. We have substantial experience in managing drawdown accounts and can also provide customised portfolios to reflect individual risk requirements. In addition we provide a full administration service to support the investment management function.

## IHT Planner

The aim of our IHT Planner service is to eliminate or reduce potential inheritance tax liabilities whilst achieving equity related returns. This is achieved by creating a balanced portfolio of established companies that trade on AIM.

## Trust Fund Management

We can advise trustees and executors on the investments under their control and help them formulate the most appropriate investment strategy. We can then manage the portfolio in line with the objectives of the trustees and their investment policy.

## Newsletter

We can send you a copy of our newsletter, Minerva, produced specifically for intermediaries. This contains a mix of general information and viewpoints from our investment team.

## The Next Step

All of our services have their own more detailed literature. Please contact one of our investment managers to discuss any of our services.

## Risk Warning

This brochure has been specifically produced for professional intermediaries in order to provide a summary of the managed services that Rensburg Sheppards offer. It is not intended for circulation to private investors. Full details can be found in our separate service brochures which are available upon request.

\* As at 30th September 2008

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#### Group Offices

Belfast Cheltenham Edinburgh Farnham Glasgow  
Leeds Liverpool London Manchester Reigate Sheffield  
Member firm of the London Stock Exchange. Member of Liffe.  
Authorised and regulated by the Financial Services Authority.  
Rensburg Sheppards Investment Management Limited is registered  
in England. Registered No. 2122340.

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