

Blackfinch Adapt AIM Portfolios

The Adapt AIM Portfolios invest in fast-growing firms listed on the Alternative Investment Market (AIM). We only invest where we believe stocks qualify for Business Relief (BR).¹ BR can deliver Inheritance Tax (IHT) relief after just two years² (and if held at the time of death).

PORTFOLIO OPTIONS



Growth Portfolio

Focus on investing in companies with strong long-term growth potential.



Income Portfolio

Bias towards companies with attractive dividend yields
Dividends received can be paid out on a quarterly basis



Mixed Portfolio

Available for direct investment,
offers enhanced diversification.



AWARDED BY
ARC
FOR COMMITMENT
TO TRANSPARENCY
2024

The ARC 3D Award indicates Blackfinch's engagement with ARC's Investment Manager Research Programme and fulfilment of the due diligence criteria. It is not a rating or endorsement of suitability for specific clients but a validation of our commitment to transparency.

¹Tax reliefs are dependent on individual circumstances and are subject to change.

²We will only invest in companies which we reasonably believe qualify for BR.

However, we can't give a commitment that investments will remain qualifying at all times in the future. Please refer to the brochure for details of the product's risks.

³The Adapt AIM Portfolios may not be suitable for all investors. We would recommend that prospective investors seek independent advice before making a decision.

⁴Not applicable on platform. See rate card on application form for other fees.
(Minimum Dealing Fee £5 per trade)

IMPORTANT INFORMATION

Capital at Risk. This Information is Issued by Blackfinch Investments Limited which is authorised and regulated by the Financial Conduct Authority (FCA Number 153860). Registered Address: 1350-1360 Montpellier Court, Gloucester Business Park, Gloucester, GL3 4AH. Registered in England and Wales Company Number 02705948. All information correct at July 2024.

KEY FEATURES

Income, growth and mixed portfolios available

IHT relief after two years (and if held at death) using BR

Suitable for new or existing ISA transfers

Alignment with UNPRI principles of responsible investing

Tax-free income and tax-free capital gains (in ISA)

In-specie transfers accepted

Available on:



POTENTIAL CLIENTS³

Clients seeking income from their investment

Clients with a potential IHT liability

Clients with ISA pots that have stored up an IHT liability

Clients who wish to retain access to their investment

Clients aiming for long-term capital growth

Clients who would like exposure to smaller companies

Clients seeking alternative investment diversification

FEES

Initial Fee **0.00%**

Annual Management Charge **1.5%**

Dealing Fee⁴ **1%**

Annual Custody Fee **0.25%**

Signatory of:

