



BREWIN DOLPHIN



BIRMINGHAM

FORWARD THINKING SINCE WAY BACK

We have over 200 years of heritage, earning a solid reputation of trust and stability whatever the financial climate.

In the fast moving and dynamic world of investment we are both progressive and proactive, with a current group turnover in excess of £200 million.

We are one of the largest independent private client investment managers in the UK, with offices throughout the country including the Channel Islands.

Our ability to help clients create and preserve wealth was recognised when we won the **Best Discretionary Service Award** at the **2008 Daily Telegraph Awards** and the title of **Best Discretionary Stockbroker 2009** awarded by Shares Magazine. Most recently, we won an award for the quality of our investment research at the **2010 Investment Week Fund Manager of the Year Awards**, in the Discretionary Investment Management Category.

These awards recognise Brewin Dolphin as a leader in discretionary investment management services and demonstrates our ability to provide innovative and tailored solutions for our clients.



DO ANY OF THESE SOUND FAMILIAR TO YOU?

I am concerned about the fall in my investment income, who can I turn to for advice?

I am nearing retirement, how can I check whether my pension is going to meet my needs?

I wish someone could help me to manage all my different investments.

How can I minimise my Inheritance Tax position?

As a Trustee, I want to ensure the assets under my guardianship are properly managed.

WE CAN HELP...







IN BIRMINGHAM

Our success is founded on the people who deliver it. Established in 1995, the majority of the fifty strong team have worked together for many years building strong relationships with clients in and around the West Midlands and elsewhere in the country.

At Brewin Dolphin in Birmingham we recognise the importance of identifying with each of our clients' needs and creating solutions that are specifically tailored to meet these.

Planning is the key to your future. Our team of professional Investment Managers and Financial Planners have extensive knowledge and expertise which enables them to navigate you through the myriad of investment options available.

With the support of extensive infrastructure and resources, we are in the right position to deliver to you clear, impartial and personal advice tailored to your objectives, and risk profile.

In addition to considering the types of investment suitable for you, we will also consider the level of involvement that you wish to have in the ongoing management and decision-making process. This is reflected in the range of services and options available to all of our clients, such as online valuations services.

WE TREAT OUR CLIENTS AS INDIVIDUALS

At Brewin Dolphin every investment relationship begins with you, your Financial Planner, Investment Manager and a blank sheet of paper. Before we offer any advice, we start by gaining a true understanding of your circumstances and your needs. That means we always invest time learning about your financial situation and ambitions for the future.

INDEPENDENTLY OWNED

We have no ties to any fund managers, banks or insurance companies, and are able to deliver unbiased financial and investment advice. We can search the whole financial market to find the most appropriate products and services. Brewin Dolphin's independence comes from it not being owned or controlled by any other company. Its status in relation to advising on packaged products is 'whole of market'.



OUR RESEARCH CAPABILITY

The universe of investment opportunities is complex and constantly evolving. To ensure we remain at the forefront of all new developments, Brewin Dolphin has a dedicated in-house research team. Our research specialists provide top class objective analysis on all major asset classes.

OUR SERVICES

We offer a range of services to clients from the management of an investment portfolio to comprehensive Financial Planning.

Discretionary Management

Discretionary Management is our core service and gives access to professional expertise without the administrative burden associated with the day-to-day running of an investment portfolio. Once you have agreed your requirements and aims with your Investment Manager, we will then make all the decisions on your behalf. This style of management ensures that we can act swiftly when markets change. Groupwide, we currently manage over £14 billion of our clients' money in this way.

Advisory Management

If you prefer to make your own investment decisions but still want to have access to professional advice, you can take advantage of our Advisory Management service. This service allows you to be involved with the day-to-day business of managing your portfolio.

The value of your investment may fall and you may get back less than you invested.

No service is suitable in all cases. Please seek our advice as to which service would best suit your circumstances.

Financial Planning

We are able to offer our clients in-depth, impartial financial advice. After meeting with you to gain a clear understanding of your aims and goals, our specialist Financial Planners are able to advise on the management of your wealth based upon your current needs with solutions that also have the flexibility to adapt to any changes in your life. The comprehensive advice that we can offer to our clients encompasses four principle areas – tax planning, pension planning, protection (products such as life assurance and critical illness cover) and investment planning.

Administration Services

At Brewin Dolphin we pride ourselves on offering our clients a high quality and personal level of service. Your Investment Manager will take care of everything associated with the running of your portfolio which will include all investment administration.

The Brewin Dolphin nominee service enables our administrator to act on your behalf saving you time in dealing with all the paperwork that arises from investment transactions. Although you retain beneficial ownership, investments are registered in the name of one of Brewin's nominee companies.

Detailed valuation reports are provided on a regular basis and contract notes are issued with every transaction undertaken. We also offer online portfolio access through our secure server at www.brewin.co.uk, where valuations can be viewed.

AN INTRODUCTION TO OUR KEY MANAGERS

We have dedicated teams who look after a wide range of discretionary and advisory portfolio investment management accounts. Our Financial Planning team operates both independently and in conjunction with these teams depending upon our clients' needs. The knowledge and experience within these teams enables the managers to select the right combination of products and services appropriate to your financial situation. The team arrangement ensures that there is always someone on hand to talk to.





Stephen Jones

Head of Birmingham Office
Divisional Director, Private Clients

Stephen was one of the founding directors of the Birmingham office when it opened in 1995. He is a Fellow of the Chartered Institute for Securities & Investment. As well as being Head of the Birmingham office, he manages a diverse range of portfolios for private clients, trusts and charities.



John Driver

Divisional Director, Private Clients

John was one of the founding directors of the Birmingham office. A Fellow of the Chartered Institute for Securities & Investment, he brings almost 40 years experience working with a young and focused investment team. Having seen many Bull and Bear market cycles he enjoys reading market trends and working closely with a broad range of clients.



Stephen Glazzard

Divisional Director, Private Clients

Stephen was one of the founding directors of the Birmingham office. His career in stockbroking spans over 30 years. He specialises in collective investments, and is a member of the Brewin Dolphin Group committees for Asset Allocation and Structured Products.



Stephen Williams

Divisional Director, Private Clients

Stephen is an Extel rated analyst. Having over 25 years experience with smaller companies, he is responsible for the analysis and management of our specialist AIM portfolios.



Anne Worthington

Divisional Director, Private Clients

Anne began her stockbroking career in 1987, joining Brewin Dolphin in 2001. She is Head of the Discretionary Management Team and also manages a range of portfolios, principally for private clients. Anne is a Fellow of the Chartered Institute for Securities & Investment.

A PERSONAL APPROACH

Our personal service is exemplified by the fact that our clients have one point of contact throughout their relationship with us – their Investment Manager. This partnership ensures that our Investment Managers are able to keep up-to-date with their clients' requirements. Similarly, our clients always have a clear idea of how their investments are being managed.



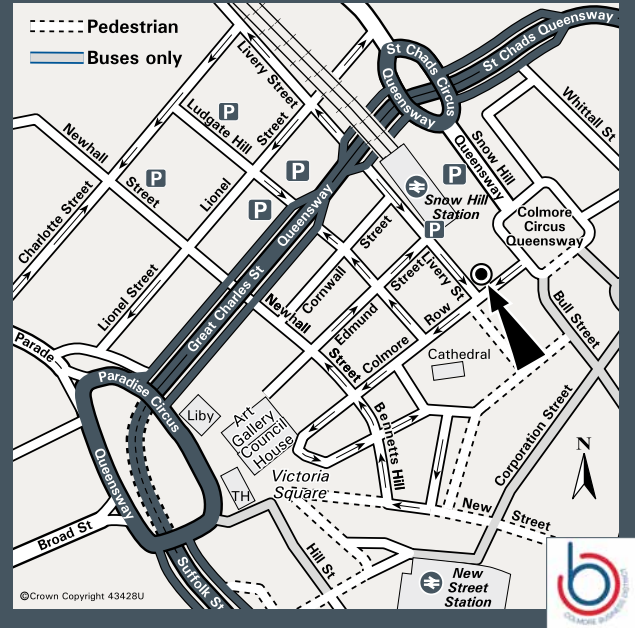
THE NEXT STEP

If you would like to know more about Brewin Dolphin in Birmingham and what our investment management team could do for you, please do not hesitate to contact us.

Whether you already have investments in place or wish to set up a portfolio for the first time, we would be delighted to arrange a no cost or obligation consultation either face-to-face, at home or by phone.



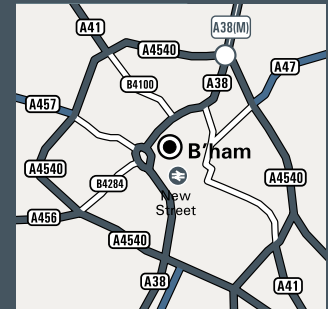
Aberdeen	Leicester
Belfast	Lincoln
Birmingham	Llandudno
Bradford	London
Brighton	Lymington
Cardiff	Manchester
Cheltenham	Marlborough
Chester	Newcastle
Dorchester	Norwich
Dumfries	Nottingham
Dundee	Oxford
Edinburgh	Plymouth
Elgin	Reigate
Exeter	Shrewsbury
Glasgow	Stoke-on-Trent
Guernsey	Swansea
Hereford	Taunton
Inverness	Teesside
Jersey	Truro
Keswick	York
Leeds	



Brewin Dolphin Birmingham
 Colmore Business District
 9 Colmore Row
 Birmingham B3 2BJ

UK
 T 0845 213 1210
 F 0845 213 1211

International
 T +44 (0)121 236 7000
 F +44 (0)121 212 0011



By Train: The nearest stations are Snow Hill and New Street.

By Car: **From M6:** Junction 6 (A38(M)) towards the City Centre.
From M5: Junction 3 (A456) towards the City Centre.

Car Parking: Metered short stay parking is available on roads close to our office. Long stay as marked 'P' on the map above.

W brewin.co.uk