



BREWIN DOLPHIN

NOTTINGHAM

Investment Management
and Financial Planning

THE WAY WE WORK

Means we treat our clients as individuals.

At Brewin Dolphin, every investment relationship begins with you, your 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 in learning about your financial situation and ambitions for the future.



OUR INDEPENDENCE

Means we can serve our clients better.

Originally established in 1762, we're now the UK's largest independent private client investment manager. That independence gives us the freedom to search the whole of the investment marketplace for our clients. So instead of pushing you towards in-house funds, we'll be focused on finding the investments that are exactly right for you. It all adds up to fair and impartial advice when you are making the decisions that will shape your financial future.

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.



AT BREWIN DOLPHIN

We believe that the investment advice you receive should be as individual as your financial needs. We have worked this way for generations, providing tailored solutions that help our clients to create and preserve wealth.

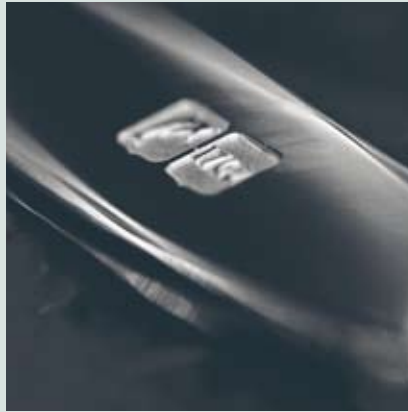
Today, we are putting that accumulated experience to work for many thousands of clients, including private individuals, charities, trusts and pension funds. We are now the largest independent private client investment manager in the UK and look after approximately £17 billion in investments from offices throughout the UK and Channel Islands.



IN NOTTINGHAM

The origins of the office date back to the establishment of the Nottingham Stock Exchange in the 1840s. The current team of 25 highly experienced staff have worked together for many years and have recently joined Brewin Dolphin. They have built a strong reputation for providing clients with professional financial advice in and around Nottinghamshire and elsewhere in the country.

Our highly qualified investment managers are all Fellows of the Securities and Investment Institute and the extensive infrastructure and resources at their disposal, enables them to advise clients on a vast array of investment options.



TALK TO US

About creating and managing a **bespoke investment portfolio** to meet your personal requirements. This could include shares, fixed interest securities, collective investments and other specialist funds.

About **Financial Planning** and assisting you in devising an effective overall financial strategy for the future. We have expertise in an array of areas, including inheritance tax planning, pension planning and business exit strategies.

About using our **Discretionary Management** service, to ensure your investments are being constantly monitored by our team of experts in the Nottingham office, who can act swiftly on your behalf to changes in financial markets.

About maximising your Capital Gains Tax annual allowance and using other tax efficient investment vehicles such as ISAs and pensions (including Self Invested Personal Pension) to make the most of your **annual allowances**.



Robin Beer

Head of Nottingham Office
Divisional Director

Robin and his team joined Brewin Dolphin in 2008 from Barclays Wealth. He is a Fellow of the Securities and Investment Institute and as well as being Head of the Nottingham office, he manages a diverse range of portfolios for private clients, trusts, charities and pension funds.



Gillian Hibbert

Divisional Director

Gillian qualified as a Member of the Stock Exchange in 1988. She heads one of the Nottingham office investment teams and has been managing investment portfolios for some 20 years. Her interests include gardening and walking.



Alan Mitchell

Divisional Director

Alan has over 23 years experience in the Investment Management industry, having begun his career with William Chapman Trease in 1986. He specialises in the technical analysis of investment markets. His main interest outside of work is property development.



Robin Mellows

Divisional Director

Robin began his investment career with Greig Middleton in 1999. He is a Fellow of the Securities and Investment Institute and principally manages discretionary portfolios for individuals, trusts and charities. He is an avid sports fan and spends his leisure time with his new baby daughter.



David Judge

Divisional Director

David has worked as an Investment Manager within the Nottingham team for over 13 years, having joined Allied Provincial in 1995. He enjoys squash, rugby and running and is the Treasurer of his local RNLI branch.



Brian James

Divisional Director
Financial Services

Brian is a Chartered Financial Planner specialising in advising individuals and Corporate clients. His area of expertise include Inheritance Tax planning, succession planning/business exiting and retirement planning. He holds an MBA and in his spare time enjoys rugby, golf and skiing.



Peter Lewis
Divisional Director

Peter began his career as a Chartered Accountant with Price Waterhouse in Nottingham before joining Allied Provincial in 1987. After a highly successful period as Head of Office, Peter stepped down from the role in 2006 to concentrate on managing his Private Client portfolios. In his spare time Peter is an active Rotarian.



Ian McCormack
Divisional Director

Ian became a Member of the Stock Exchange in 1986 and has some 25 years of experience in managing investment portfolios. He previously ran the Leicester office of Wilshire Baldwin before joining the Nottingham team in 2003. Ian is a keen rugby fan and is a season ticket holder at Leicester Tigers.



Andrew Norris
Divisional Director

Andrew has over 30 years experience as an Investment Manager, having begun his career with Wilshire Baldwin in 1972. He is a fellow of the Securities and Investment Institute and manages discretionary and advisory portfolios for a wide range of clients. He enjoys sport, music and is a keen theatre-goer.



Richard O'Neill
Divisional Director

Richard has worked in Financial Markets since 1997. He heads the Nottingham Portfolio Management team and has expertise in the analysis of global investment markets. Away from work the majority of his time is spent with his two young sons.



Mark Baucutt
Investment Manager

Mark has over 29 years experience in the Investment Management industry and is a Fellow of the Securities and Investment Institute. He is responsible for the day to day management of client portfolios ranging from private individuals to trust accounts and pension funds. He enjoys walking and cookery.

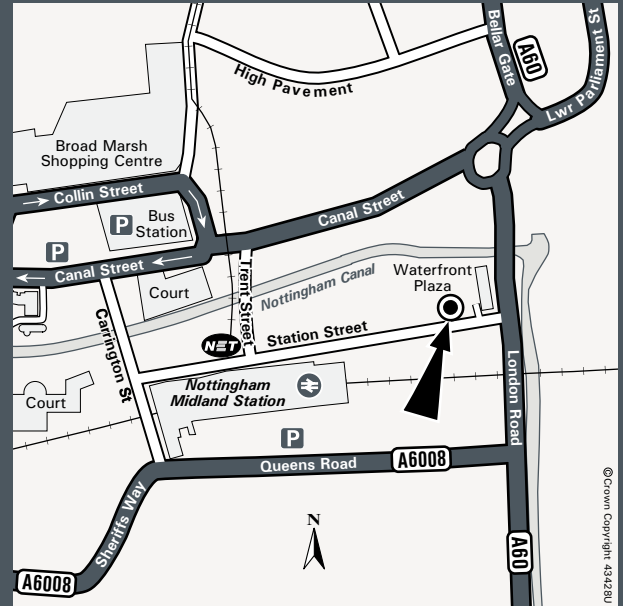


Robert Gemmell
Divisional Director
Financial Services

Robert has worked in the financial services industry for over 20 years, providing advice to both private and corporate clients on a broad range of topics, including pensions, Inheritance Tax planning and protection. Away from the office he spends most of his time on the golf course.

COMPLETE INVESTMENT MANAGEMENT

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



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International

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Train: Nottingham station is served by trains from London St. Pancras, Leicester, Derby, Sheffield and Liverpool.

Car parking: Car parks are located on the map above.

Tram: The nearest tram stop is Station Street.

W brewin.co.uk