



HARDMAN & CO.
TAX ENHANCED



NON-AIM BUSINESS RELIEF PANEL CREATION AND MONITORING

GETTING IT RIGHT WITH OUR PANEL SERVICES

The bespoke panel services from Hardman & Co allow you to offer non-AIM BR products to your clients with confidence, knowing that both the manager and the underlying investments of the product have been expertly analysed.

Why selecting products can be difficult

Non-AIM BR products have inherently complex investment characteristics. Although they generally target similar returns, there are a variety of investment strategies in the market, such as development finance, renewables, hotels, forestry and several others. Comparing the risk of one product against another is complicated, and different investment durations and liquidity must be assessed.

It is also a growing market, and the number of products available is increasing, which can make it hard to keep up-to-date with the market.

We know from experience that many advisers cannot pull all the data together themselves – they don't have the time or expertise.

Why Hardman & Co

- 1** Our research capabilities are unrivalled in the industry. Our analysts have an average of 25 years sectoral expertise, working with both public and private companies. Importantly, this allows us to look beyond the product structures and into the underlying companies in the portfolio. We offer the most thorough and comprehensive reviews in the market.
- 2** We know that all advisory firms are not the same and each client has unique circumstances. With our resources we can provide a flexible solution for each advisory firm.

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Benefits of our panel services

We offer a thoroughly compliant solution. You can be confident that our sector and market experts have analysed the products and their inherently complex characteristics to allow you to recommend suitable and appropriate products. Importantly, we also save you time and money.

Bespoke services

Our panel creation services are precisely tailored to the needs of your business, and range of client profiles. We will want to understand the parameters that you are comfortable with, and the emphasis you will want to place on different criteria.

Our aim is to achieve a balanced panel of product providers that gives you the scope to offer a flexible and tailored service to your clients, whilst having the reassurance that the investments you are recommending are well-researched and well-run companies.

An introductory workshop for advisers is included for every client of our panel service.

These services can be supplemented by:

- Education and training – we can host workshops and roadshows across the UK, and carry out personalised seminars on specific requested topics.
- Ongoing monitoring & access to analysts – we will ensure your panel is up-to-date and provide updates and news as required. You will also have direct access to analysts for questions on your panel products and the market in general.

Access to reviews

A separate service offering access for all advisers to reviews on a pay-as-you-go basis.

IF YOU ARE INTERESTED IN GROWING YOUR IHT BUSINESS,
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