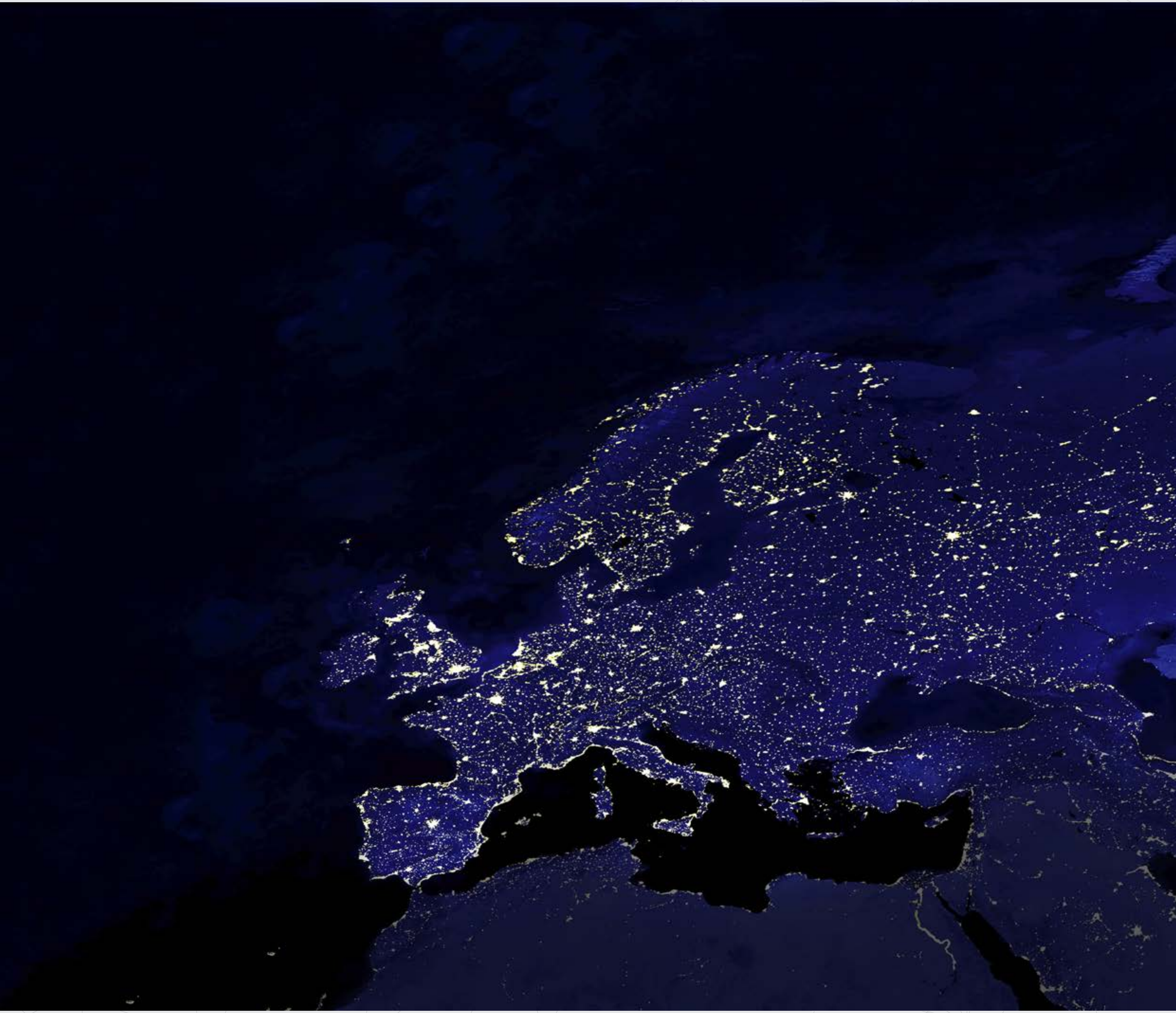
ALPHA
PORTFOLIO MANAGEMENT

Professional yet Personable



First Things First

Alpha Portfolio Management has been conceived by an experienced and committed team to provide a professional, yet personalised investment management service that caters for individuals, companies, trusts and charities.

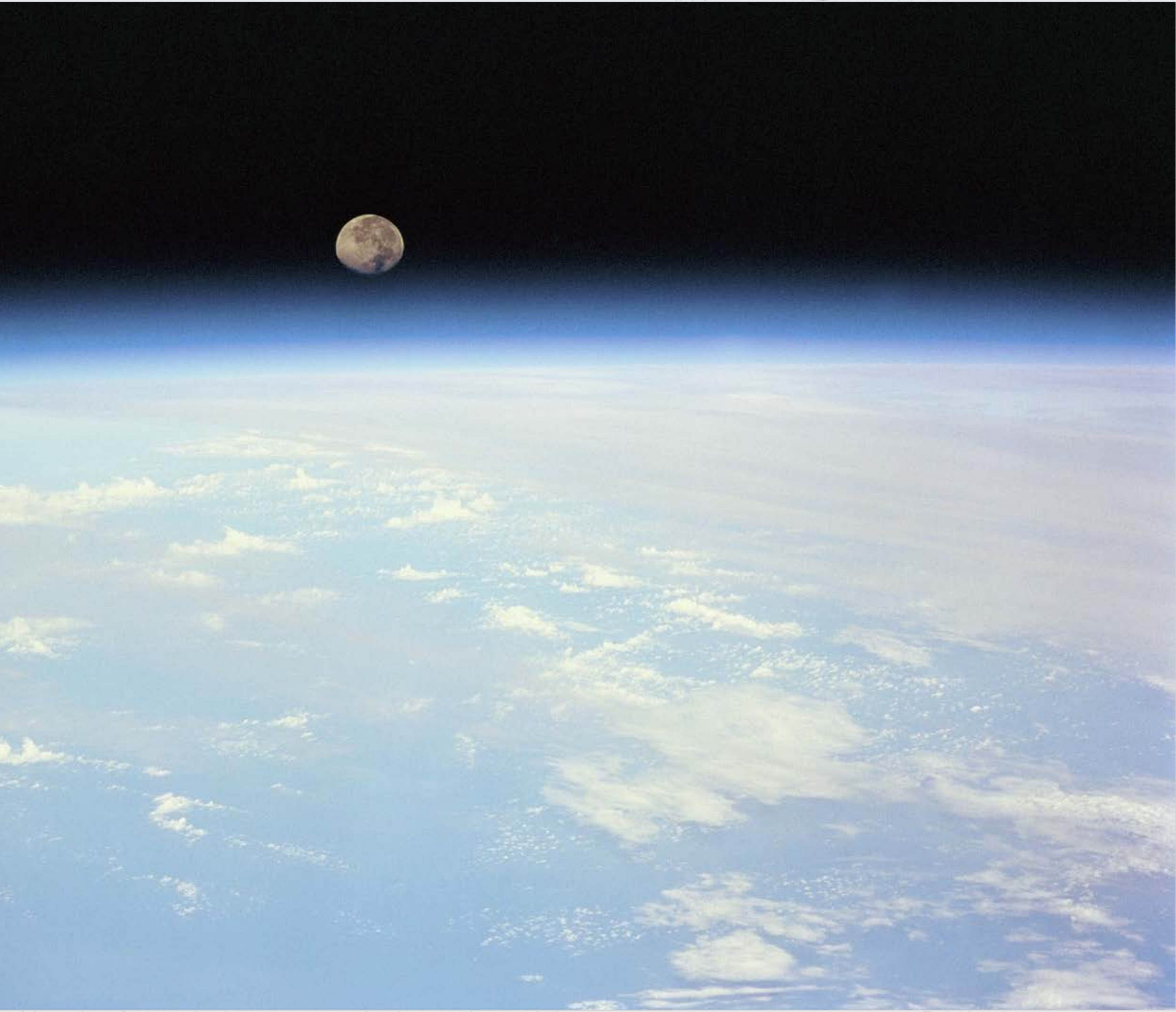
We have developed a passion for what we do. Having successfully worked together for a number of years, we have extensive insights into how to manage and administer investments. Doing the right thing the right way is as important to us as it is to you.

We are able to offer a blend of expertise that delivers a professional and structured service, expertly administered and supported. We help to make sense of markets and the investment jargon.

Our team has a successful track record of building long-term relationships with clients and their chosen advisers for more than 20 years.

We are an owner managed business, with independent managers and independent thinking. This supports our dynamic investment approach and aligns our interests with yours.

The team at Alpha can claim a strong pedigree, with members having been acknowledged for investment performance as well as breadth and depth of service.



First & Foremost

Alpha has been founded with one overriding objective, serving client requirements to the highest possible standard.

We **aim** to provide a professional, yet personal service that creates the most appropriate investment solution for you.

Working with you and your advisers, we look to **build** long term relationships based on trust and integrity.

We **strive** for excellence in all aspects of our business. Clients should expect and appreciate the clarity of our investment approach, attention to detail, and the focus and professionalism of our services.

We **believe** helping clients achieve their investment goals goes hand-in-hand with our own success. Our interests are further aligned, with our investments managed alongside those of clients.

We **hope** to meet and even exceed your expectations – if we don't, please let us know.

First Class

We believe our market insight and historic track record are key strengths. Our uninhibited investment process can differentiate us from the crowd, ensuring we remain focussed, yet agile. This allows us to act decisively and access investments that many of our competitors can't.

Key to this approach are our experienced practitioners, supported by comprehensive and thorough investment research, ensuring that every decision we make on your behalf is well thought out and only made when necessary.

Our breadth of investment expertise spans direct equities, gilts and other fixed interest, unit trusts, Open-Ended Investment Companies (OEICs), investment trusts, investment companies, Exchanged Traded Funds (ETFs) and structured products. Utilising such a broad range of investment vehicles ensures we can identify the most suitable approach for your needs.

When it comes to investing, research is at the heart of what we do. We believe consistently doing the right thing will deliver positive long term results.

Past experience has taught us that successful investing is more of an art than a science. It's about buying, owning and ultimately knowing when to sell the right investments at the right time.

Through both good times and bad, our insights have evolved over the years. Not only has it taught us many key investment disciplines but knowledge, understanding and experience has taught us that it's about asking the right questions, to the right people, at the right time. Ultimately seeking to get the risk:reward ratio in your favour.

First Amongst Equals

We specialise in developing bespoke investment solutions for clients.

We work with you and your chosen investment partners to understand your goals and attitude to risk in order to tailor a service that meets your particular investment needs.

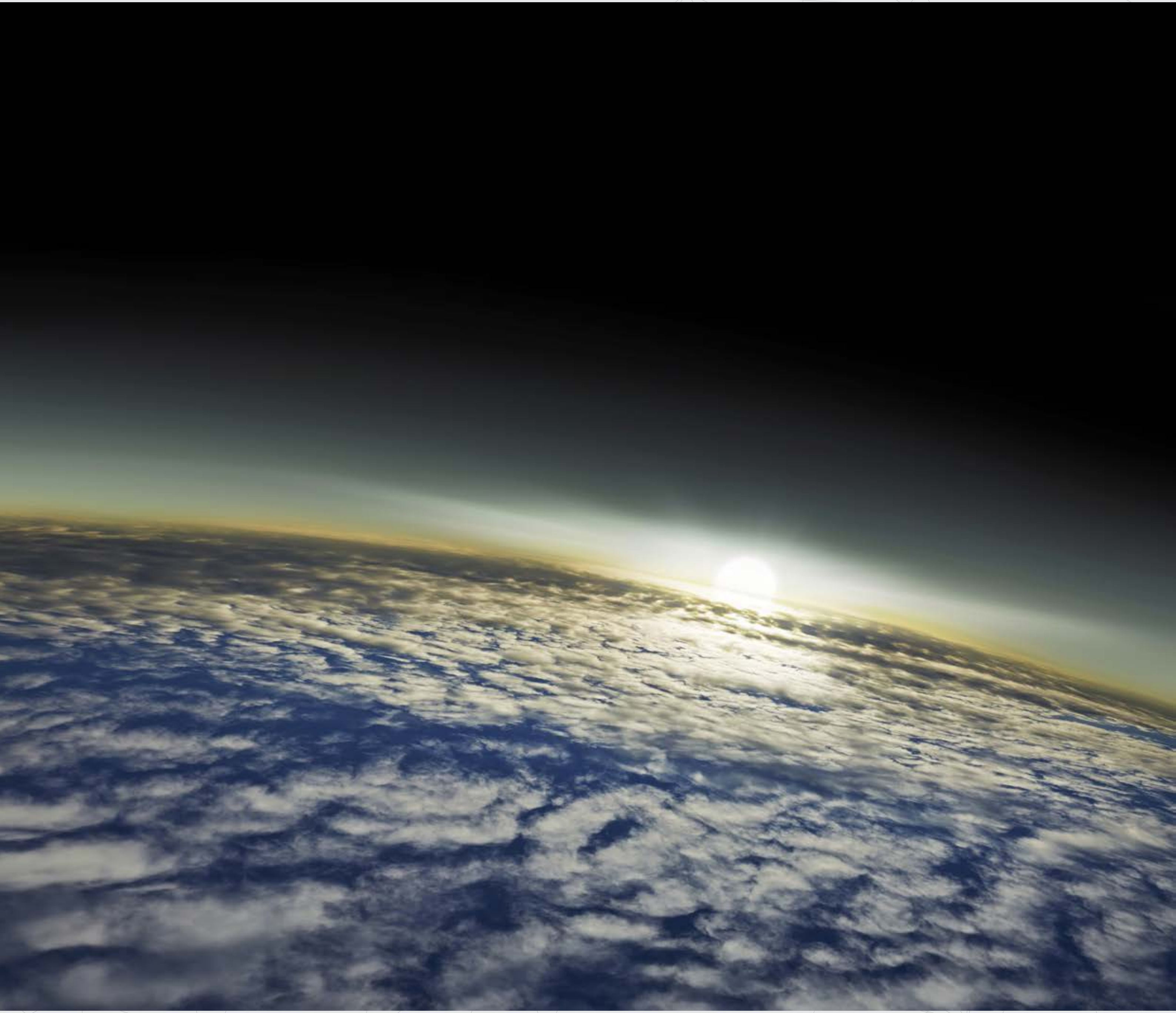
Our extensive resources encompass research, knowledge and insights, as well as market leading portfolio management systems to provide a personalised investment approach tailored specifically for you.

We employ a team based approach to portfolio management, which combines each individual's knowledge and expertise, to support your Portfolio Manager who is on hand to discuss current and future investment requirements.

Our dynamic range of investment services embraces collective model portfolios, a fully bespoke service incorporating investment restrictions and ethical considerations, as well as an AIM-IHT service.

Being cost conscious, with a clear and transparent pricing policy, provides an attractive overall portfolio charging structure.

We feel all these components ensure we offer you the best possible service.



First Rate

Sound financial planning has never been more crucial.

Whilst we are not tax advisers, we are experienced tax efficient investment managers. We work with you and your chosen partners to achieve goals in a tax conscious manner, wherever possible.

We specialise in managing investments within a broad range of tax efficient investment wrappers.

- New Individual Savings Account (NISA)
- Pensions, including:
  - Self-Invested Personal Pension (SIPP)
  - Small Self-Administered Scheme (SSAS)
  - Personal Pension (PP)
  - Qualifying Recognised Overseas Pension Scheme (QROP)
- Onshore Bonds
- Offshore Bonds
- Trusts

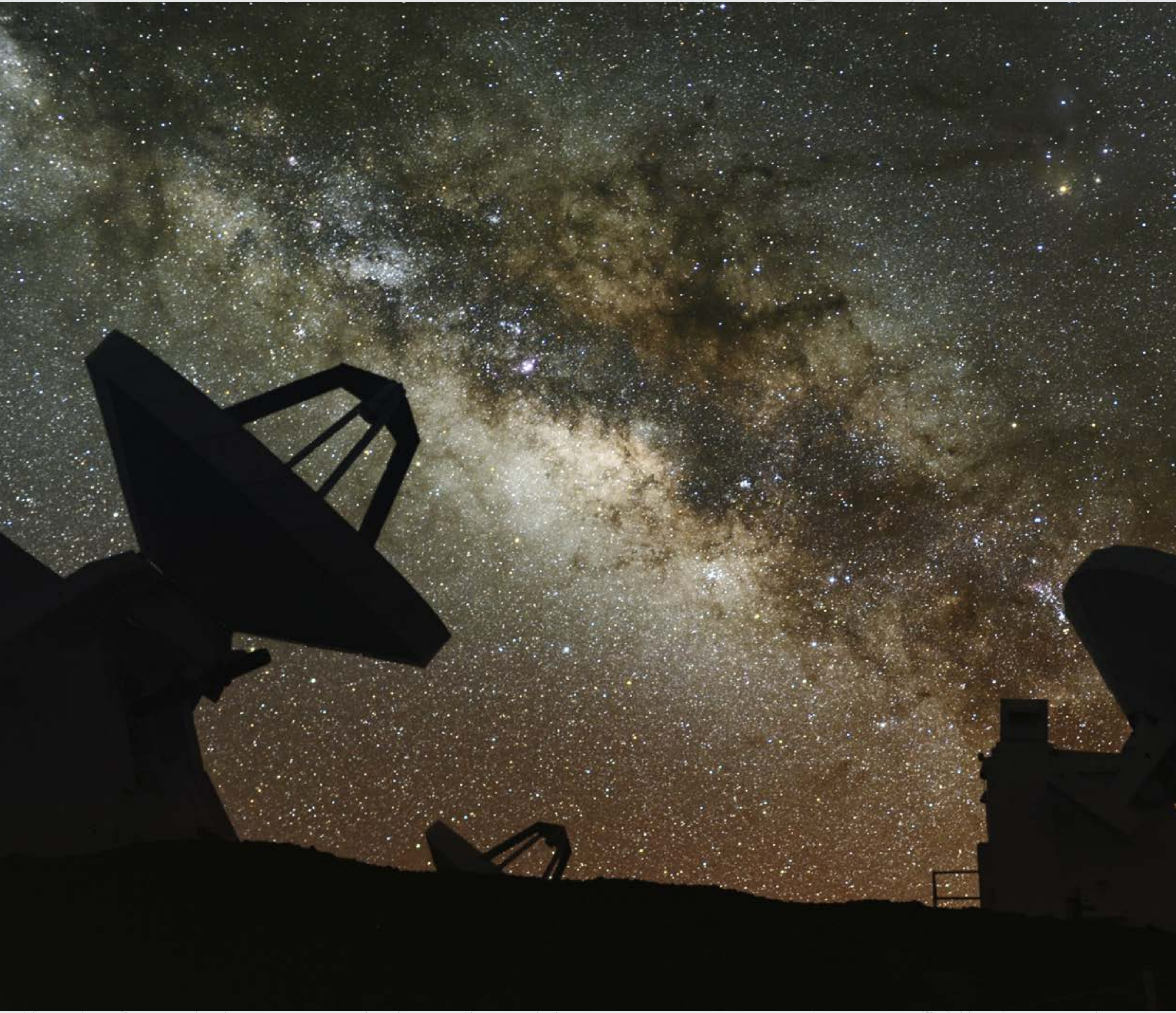
We work with more than 20 market leading providers to deliver the service you desire. We publish our active partnerships on our website, however this is not an exclusive panel and we are more than happy to engage with your preferred providers.

AIM-IHT Service

This service offers investors an efficient way to reduce their inheritance tax liability while remaining in control of assets, as well as benefiting from the growth in capital and dividends of smaller companies.

As a potentially tax driven investment, a tax specialist should be consulted before considering this service.

Please note the value of shares and the income from them can fall as well as rise and investors may get back less than they originally invested.



Putting You First

We aim to provide an exceptional overall service, combining experienced portfolio management with excellent administration.

Our experienced administration team offers a personal, yet professional service, having worked with clients and advisers for more than 20 years.

Our communications are open and honest, working to keep you fully updated and informed with our opinions.

Clients can access our market leading online service which provides detailed portfolio analysis. In addition, we provide twice yearly reporting although this can be more frequent if preferred and tailored to your needs.

All of this is available alongside a cost conscious charging structure, with clear and transparent pricing, ensuring an attractive overall proposition.

First & Last

We take the security of your assets and our regulatory responsibilities very seriously and want to make sure everything is clear and you are comfortable with the procedures that we have in place, before proceeding.

The firm has robust systems and controls in place to ensure the safety and security of client money and assets. All cash and assets are segregated and held in trust by the firm.

The pooling of assets and cash improves efficiency and lowers administration costs whilst ensuring that, in the unlikely event that the firm were to default, your investments would not form part of its assets.

We are a member of the Financial Services Compensation Scheme (FSCS) which offers additional protection. As such, private clients are eligible to recoup some of their investments and cash in the event of default.

In addition, we have specialist insurance cover as we feel this is an important part of our commitment to further protect us and our clients from fraud, theft, loss or damage to any client assets in our custody. We are satisfied that this cover is adequate and appropriate for the business that the firm conducts.

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