


THORNTONS INVESTMENTS



Personal Injury Trusts and Court of Protection

HELPING YOU LOOK AFTER YOU AND YOUR FAMILY'S FUTURE



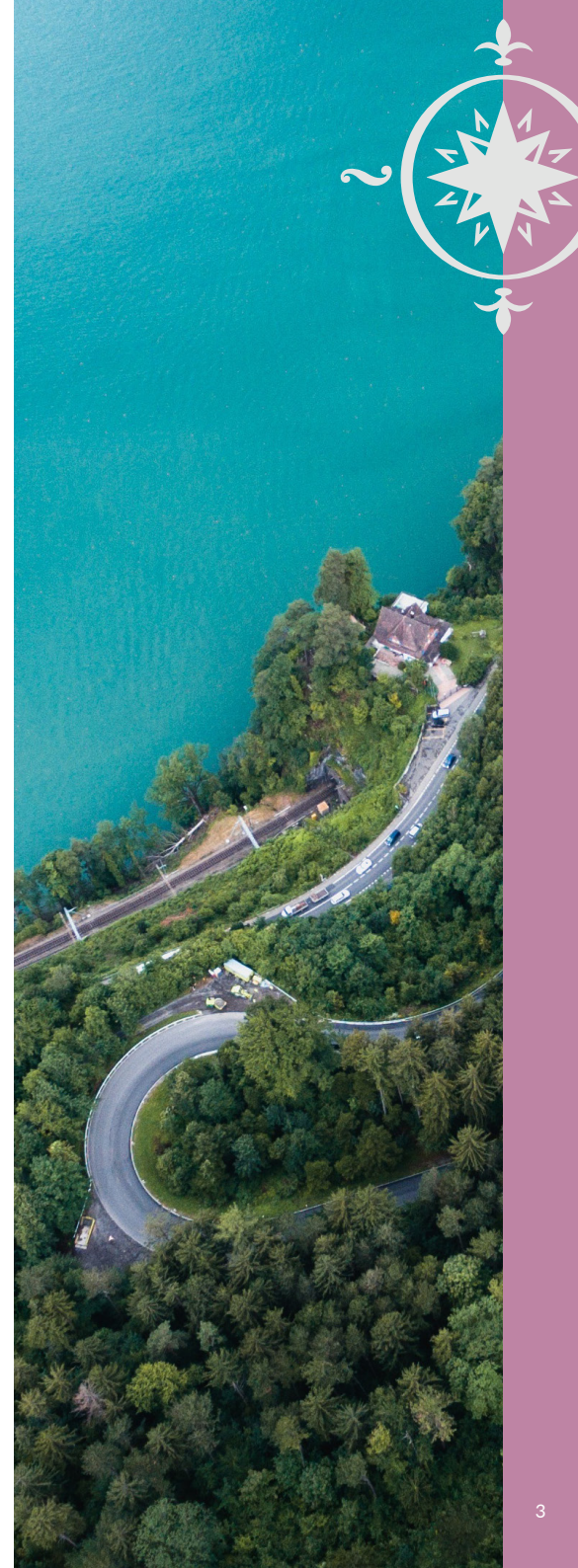
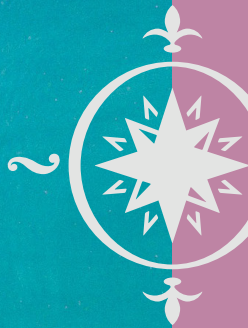
At Thorntons Investments, we have a wealth of experience in financial planning and managing investments which are tailored to meet your current and future needs.

Personal Injury Trusts and Court of Protection

Investment Solutions

Your compensation award can help you safeguard your financial future, but being awarded large sums of money can be daunting and it is important that you appoint people that you can trust and can rely on to advise you and manage the money effectively.

We will work closely with you, on a relationship basis, reviewing and adapting investment objectives as your circumstances change and evolve.



Introduction to Thorntons Investments

Our approach to investing is embedded in our philosophy of holding investments over the long term with a focus on fundamental value.

We are firm believers in the importance of patience, discipline, and a focus on long-term investment objectives.

The second pillar to our philosophy is the importance placed on face-to-face client relationships. Investment decisions are made with the aim of achieving the best possible outcome for you, within an agreed level of risk. This is best achieved when our client investment managers can regularly discuss matters directly with you and your advisory team.

We have a long track record in creating portfolios tailored to individual needs. Unlike many other investment firms, we do not outsource investment decisions to colleagues in a centralised department. We pride ourselves on being a boutique investment firm offering a personal touch.

Wrap Around Adviser Solution

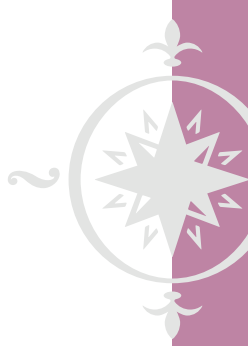
At the heart of this journey is you and those closest to you.

We understand the importance of selecting a reliable client investment manager to whom you can entrust your award of damages. Our aim is to make this as smooth a journey as possible by working closely with you and your trusted advisers, providing a united team of support.

To provide an all-encompassing financial service, Thorntons Investments team up with Thorntons Wealth, providing both investment management and financial planning expertise. Together, we liaise closely with you and your advisers to ensure a seamless service throughout your investment journey.

Our desire to work with clients on a relationship basis means we strongly recommend meeting regularly, at least annually, to review the portfolio together and to adapt our investment approach as necessary to any changing needs you may have.





Our Process

Step 1: Discovery Meeting

We begin with a comprehensive discussion to understand your financial goals, risk tolerance, and any investment preferences.

Step 3: Implementation & Management

We implement the strategy, continuously monitor your portfolio, and adjust when required or when an investment opportunity presents itself.

Step 2: Personal Strategy

We create a tailored investment strategy, designed to meet your unique needs and objectives.

Step 4: Ongoing Support & Review

Regular reviews and updates ensure your portfolio remains aligned with your goals and adapts to changing market conditions.

Our Investment Process

Our discussions with you and your advisers are the foundation on which we build your investment portfolio.

By understanding your needs and circumstances we will always ensure your portfolio has an appropriate and sensible spread of risk, whilst seeking to make investment selections that will yield the best returns. We are strong advocates of the merits of diversification and will likely include a mix of assets, such as equities and bonds. We look for investments with the ability to provide durable and compounding returns, with a focus on the total return (both capital and income) as opposed to just price.

All portfolios are monitored to ensure compliance with our investment process. This includes monthly peer reviews of client portfolios, which is an added layer of quality control, to confirm the portfolio aligns to your own criteria as well as our in-house guidelines.

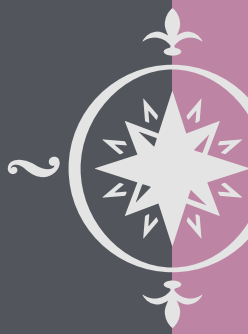
Investment Decisions

Our client investment managers are all members of the decision-making investment committees. Collectively we decide on which investments can be included in portfolios. This means that our client investment managers are able to apply their first-hand knowledge of your circumstances and preferences and the role the portfolio plays in your financial plan to select the appropriate investments to help your objectives.

Annual Management Fees

Annual investment management and financial planning fees are charged as a percentage of the value of your investments.





Contact

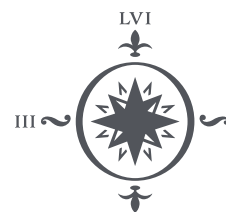
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Any suitability decisions will be based on a comprehensive review of your circumstances, objectives, and requirements, taking full account of your attitude to risk and capacity for loss. Any information concerning the tax treatment of an investment is based on our understanding of current HMRC rules which may be subject to future change.

Tax advice is not regulated by the Financial Conduct Authority.

This document has been prepared using all reasonable care. It does not constitute investment advice. Past performance is not a reliable indicator of future performance. The value of investments can fall as well as rise and clients may not get back the amount originally invested.