Transferring AIM Portfolios



Making A Transfer

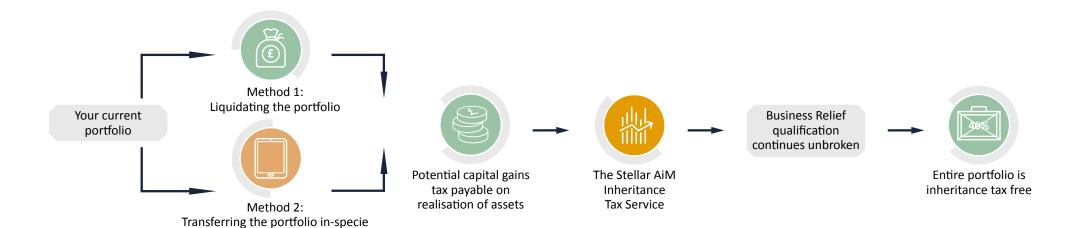
★ If you already own an AiM portfolio you can transfer it easily to the Stellar AiM Inheritance Tax Service

There are two methods of transferring:

- ★ 'In-Specie' which transfers your investment to us from your current provider without liquidation
- ★ Liquidating the portfolio, which is effectively selling your investments and transferring the proceeds to us to reinvest
- ★ All Transfers can be liable to taxation on capital gains accumulated over the life of the previous investment

Benefits To You

- You will benefit from transferring to the Stellar AiM Inheritance Tax Service by maintaining exposure to the world's most successful growth market
- You will gain security from the strategic diversity of the Stellar AiM Inheritance Tax Service
- ★ We invest in some of the most established AIM quoted companies, which will ensure your portfolio to be free of inheritance tax
- ★ Business Relief qualification of your existing portfolio continues unbroken when you transfer



stellar-am.com

Important Information

Stellar Asset Management Limited does not offer investment or tax advice or make recommendations regarding investments. Prospective investors should ensure that they read the product literature and fully understand the risk factors before making any investment decision. This document is dated July 2020 and is exempt from section 21 of the Financial Services and Markets Act 2000 and is not required to be and has not been approved for the purposes of the section because it is only being communicated to selected Investment Professionals (as defined under article 19 of the Financial Services and Markets Act 2000 (Financial Promotion) Order 2005). If this document is forwarded to any other person, you must ensure that you have taken responsibility for the document under the financial promotions rules and identified yourself as the issuer. Stellar Asset Management Limited of Kendal House, 1 Conduit Street, London W1S 2XA is authorised and regulated by the Financial Conduct Authority.