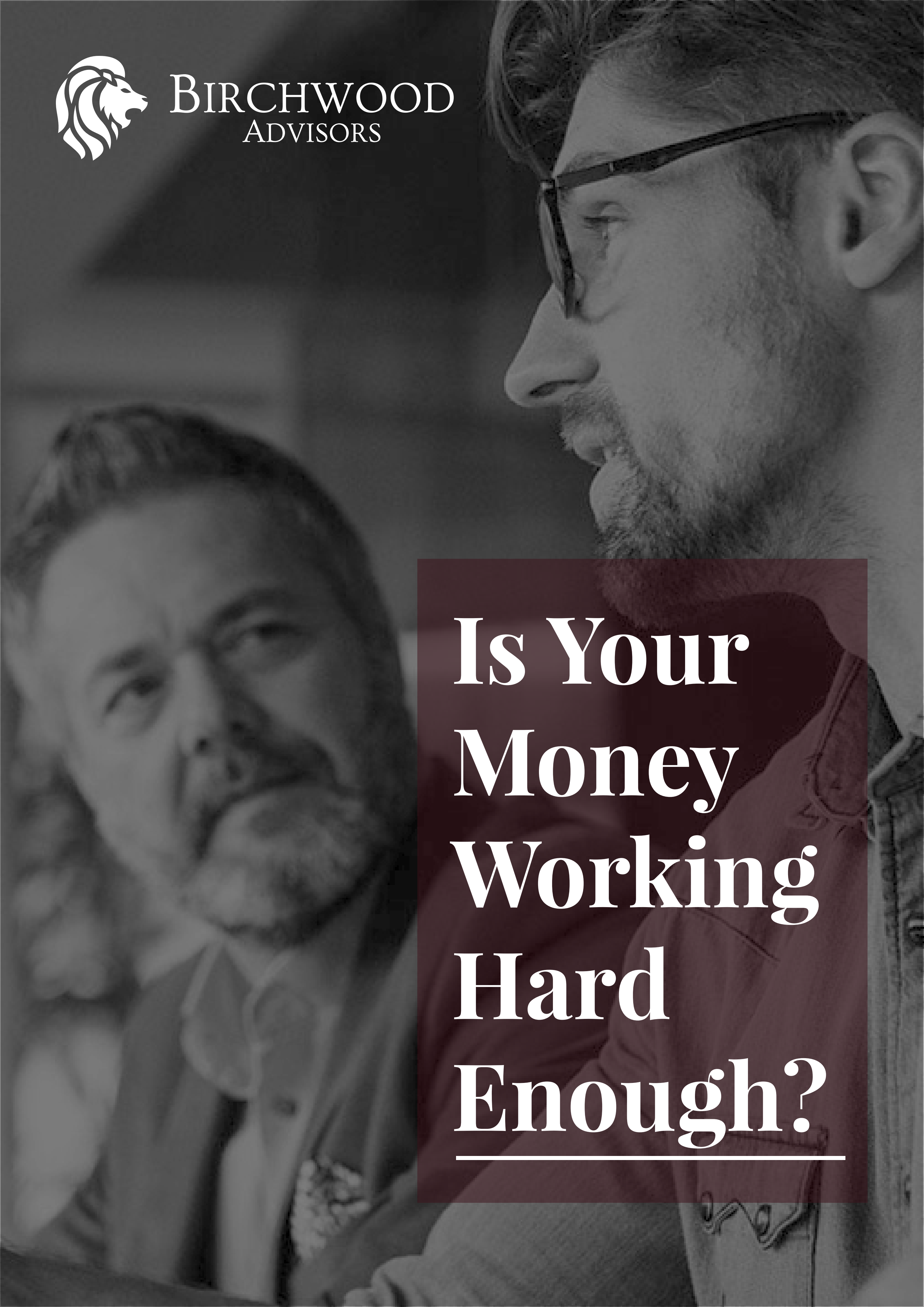

Birchwood
Advisors

Is Your Money Working Hard Enough?

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Is Your Money Working Hard Enough?

About Us

Birchwood Advisors has established a reputation amongst its growing client base for consistent results through a highly personalised and individual approach, tailored specifically to meet the increasingly complex wealth management requirements of our mainly expatriate investor base.

Since our establishment, we have perfected our approach and pride ourselves in providing a diversified and broad range of investment opportunities which are well researched and personally selected by our exceptionally talented investment professionals and partners.

Our Passion for Sustainability

We understand the challenges faced by our increasingly globalised environment and make sure that we support best practices and sustainable approaches in the pursuit of obtaining superior returns for a growing proportion of our clients who demand a more socialised and inclusive portfolio.

In doing so, we often find ourselves supporting a broad range of charitable organisations which are tackling issues that are important to us all, from alleviating poverty to protecting the environment and fostering the development of science and innovation, to driving productivity and building a more inclusive worldwide environment.

Values and Sponsorship

In this fast-moving world where capital is increasingly mobile we maintain our long-term focus towards traditional values and innovative solutions which we firmly believe provide the bedrock for all economic development. We absolutely believe that success in business is bound tightly to creating both social as well as cultural development and we maintain a strong social commitment which enhances our investment skills hand in hand with our love for the environment and community.

Our partners all share similar beliefs and as we have grown we have maintained a shared commitment towards cultivating talent and trumpeting success, often in lock step with many of our more influential clients who are well known artists, musicians and cultural identities.

Advisory Board

Our board is the bedrock of our firm and remains the primary force behind all our investment decisions and actions as it maintains overriding accountability for chartering the course for our client advisors, while making sure to maintain and strengthen our financial and operational performance.

Our chairman is our founding partner and he oversees our financial and operational executive directors as well as our numerous non-executive and independent directors, all of whom subscribe fully to our system of shared values as well as ethical and professional standards which bind us all so closely together.

Wealth Management

Overview

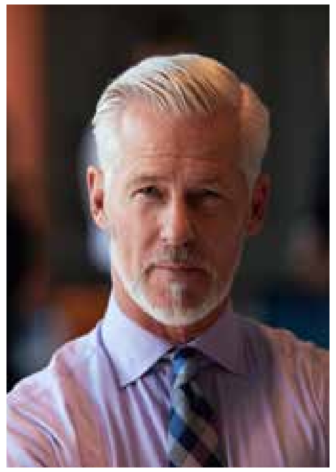
We have quickly established a reputation for managing the wealth of our increasingly complex clients who often hold citizenship in one country, residency in at least one other country, children schooling in several countries and are constantly on the move. We take a global view and approach our demanding responsibilities through a dedication to ensuring each and every client is advised as to what best suits their individual and often complex needs. Our unique approach to managing your wealth means you can rest assured that we will expertly navigate your financial options to provide you with the most suitable investments available in today’s increasingly complex financial world. We understand you worked hard to build up your wealth and we will ensure that your wealth will work hard for you.

It is important that we get to know you and our partners and advisers will work hand in hand with you to make sure we understand your needs and appreciate your unique situation. Whether you are looking to retire in the immediate future or are looking to provide added protection to preserve your wealth we can offer unique and individual advice and opportunities tailored specifically for your situation. Our focus will always be to provide the most relevant and suitable investment recommendations for you and we will make sure that we take account of every aspect of your personal wealth management situation.

Our Investment Services

A large amount of our, as well as our clients, success comes from maintaining a highly disciplined and methodical approach to searching the world’s leading investment opportunities in order to source the most appropriate and correctly risk profiled investments for you.

At the core of our process is a risk based system designed to provide an appropriately diversified portfolio of investment opportunities which we introduce over time to our clients as we painstakingly build an overall picture of each client’s overall wealth management profile.



Wealth Management and Advisory Services

We endeavour to keep our clients up to date with current developments on the world’s financial markets and provide them with their own personal relationship manager who provides each and every client with competent advice and access to the latest opportunities available through our extensive resources. Ultimately, we believe long term relationships can only be established through trust and that this needs to be built through continuous and reliable communication on a timely basis.

AT THE VERY HEART OF OUR ADVISORY SERVICES ARE THREE CORE PRINCIPLES:

Superior Advice

We are committed to making sure our partners and client advisors are up to date with industry standards and regulations and equipped to provide the very highest level of service and knowledge.

Tailormade Solutions

We dictate that we know your over wealth profile so we can reliably and consistently provide the most suitable and strategic investment opportunities specifically suited to your overall wealth management goals.

Consistency

If you are after quick and sporadic returns we are not for you as we focus on responsible investing for the long term, taking into account good corporate governance, as well as social and environmental considerations which form the basis of our investment process.

Advisory Services

Together Birchwood Advisors and its founding partners have amassed many years of experience in the worlds investment markets and we have an intricate knowledge of how to make the best out of the increasingly and ever-growing opportunities for investment. Together with our professional client advisors we can help you identify and execute your wealth management goals in the most cost effective and timely manner possible.

Understanding

Your Overall Position

We believe it is crucially important to understand our client's overall wealth position and we take the time to carefully structure appropriate recommendations that take account of your financial framework, looking at all sides of your financial position from cash and investments to mortgage debt and other financial obligations.

Flexible Personalised Approach

Each and every one of our clients is different, they built their wealth in various ways and they all have different and unique requirements for managing their wealth. We therefore have a strong focus to provide individual and personalised advice and recommendations which we tailor towards the specific needs of each of our clients. Risk profiles vary enormously and we aim to provide flexible alternatives for investment whilst helping our clients structure for retirement purposes as well as to protect their wealth.

Best of Breed

Recommendations

Having built up long term relationships with many of the world's pre-eminent investment houses' Birchwood Advisors prides itself on delivering tailored outcomes which redefine the definition of excellence in wealth management. Through our timely analysis and navigation of the global investment markets we bring our high net worth individuals, families and institutional investors the very best opportunities available for investment.

Staying the Course

Your advisor attaches great importance to understanding your precise needs and long-term wealth management goals and draws upon the collective expertise of our firm and their colleagues to provide flexible and objective recommendations whilst recognising the need for immediacy in implementation.

Birchwood Advisors Investments

At Birchwood Advisors we pride ourselves on providing our clients with the very best advice covering a broad range of investments as well as portfolio services. We have developed deep and long-standing relationships with many of the world's best investment managers and can provide a full range of structures and strategies to meet our clients long term investment requirements. As many of our clients are expatriates and professionals spread throughout the world we can advise on the often-complex world of financial solutions and opportunities.

Discretionary

Many of our clients don't have the time or expertise to manage their own investments, so they take advantage of our discretionary portfolio services which are managed by our highly professional partners and advisors who have developed an enviable track record throughout the investment community.

Advisory

At the core of our value proposition is our advisory service which has overtime developed expertise at sourcing out the very best investments available in the global markets, whilst providing the flexibility for our valued clients to select the most appropriate investments for them.

Execution

We can't stress how important execution is so we have developed systems to make sure we secure the best available prices for our clients whilst offering real-time trading in all equity, bond and foreign exchange markets.

Individual Approach

Over time we have built our business to provide the very best and widest selection of investments available in the worlds markets in order to provide our clients with the highest quality of choice designed to preserve and grow their wealth for the long term. We understand that many of our clients don't have the time or inclination to do this themselves so we are committed to providing them the peace of mind they seek. Investment is a very personal process and demands spread across many areas so we have built up invaluable connections throughout the world which we draw on to bring the most suitable solutions seamlessly to our clients.

Succession Planning

We advise our clients on the increasingly complex global world of wealth management and help them successfully build the structures most appropriate to passing on their wealth to future generations and loved ones.

Family Structures

An often complex and troublesome area for many of our clients so we focus on bringing together all parties in support of building structures that are designed to last for the long term.

Investments

Our primary driving force is to exceed our clients' expectations for superior investment returns whilst at the same time managing risk exposure to preserve and protect our clients' capital. We have developed risk models which are tailored specifically to reflect the various risk profiles of our clients and our expertise lies in executing at the right time and delivering a diversified portfolio of investment opportunities. We focus heavily on discipline whilst encouraging our research team and financial advisors to be creative to deliver appropriate outcomes for each and every one of our valued clients.

Our Value Added

Our advisors have been sourced from leading and reputable investment banks and wealth management firms and have been indoctrinated into Birchwood Advisors well defined and structured approach to investing. All our advisors have experience in all areas of managing client capital and draw upon the knowledge of market-leading research and analysis and our in-house skills to generate investment strategies which are designed to achieve above average out-comes.

Discretionary Services

Birchwood Advisors offers its clients a balanced mix of investment opportunities which are individually tailored to match each client's individual risk profile and long-term investment goals, and we strive to ensure that our recommendations match your specific needs and meet your long-term plans.

Birchwood Advisors then focuses closely on monitoring your investments to make sure we maintain a suitably balanced portfolio and one which has the necessary controls, checks and balances in place to provide the best possible protection of our clients' capital.

Tailored Services

Many of our clients are still actively busy in their successful professional careers and in recognition of this we offer a discretionary service where our advisors carefully select a suitable range of investments which match your overall investment objectives and risk profile. We leave the final decision up to our clients but work hand in hand with you to deliver the information you need to make strategic choices and ongoing adjustments throughout the holding period of your investments.

Specialised Screening

As part of our service we constantly screen global markets with a focus towards identifying varying opportunities for both capital appreciation with income generation within an overall controlled risk environment. In doing so you can trust that Birchwood Advisors is up to date with leading developments across a broad range of investment opportunities which include equities, bonds, commodities and property and more specialist trends within various sectors as well as specialised situations.

Recommended Investments

Birchwood Advisors is your partner in the global markets and will work closely with you to identify and execute your investment decisions with the shared aim of achieving your long-term investment goals.

Personalised Portfolios

Our advisors never lose sight of the fact that you worked hard to generate your wealth and we are here to help you make the most of your investment power by providing you with professional recommendations and institutional level knowledge. Our advisors are trained to provide our clients with flexible recommendations that adapt to your changing circumstances and are supported by well-rehearsed asset allocation principles for each client's specific risk and return requirements. We draw on a range of sources to keep you updated with the latest research and market insights and constantly provide updates on market conditions, new opportunities as well as alternative investment developments. In doing so our clients can rest assured that they are kept up to date, which we find is particularly important in today's times of rising volatility and emerging opportunities.

Dynamic investment advice

Our advisory service aims to provide many of our busier clients with the knowledge and support needed to help them quickly identify and digest the ever-changing trends within the global investment markets. Our team of advisors provide a disciplined and ongoing flow of information specifically summarised and tailored for each of our clients' specific investment and wealth management goals. We save you time and highlight the most important trends and developments which encompass not only economic developments but also emerging trends across all asset classes throughout all of the world's major markets. In this way, we have built up a solid reputation for providing timely, well researched and thought-provoking advice in real time and specifically prepared to meet each of our clients' specific wealth management goals.

Structured Solutions

Whilst our focus is to provide superior investment returns for our clients, we understand that our clients have differing circumstances and objectives and therefore our advisors are trained to work with our many partners to help our clients achieve their investment objectives which suit their individual circumstances.

We therefore encourage our clients to discuss their pension plans with us so that we can offer specific recommendations that are carefully crafted to meet your individual circumstances. For our expatriate clients, our advisors have a deep understanding of various tax efficient vehicles, whether onshore or offshore, and we have extensive experience in dealing with and through these 'investment bonds' and their providers, which are typically structured as life insurance policies.

Personal Execution Services

It is important that once we structure the appropriate investment for our clients, we are able to execute the relevant trades in a timely manner and of course at the best possible price and with a fair and reasonable exchange rate.

Investment dealing services

Our trading systems have been set up and designed to provide quick access to global markets and are sufficiently coordinated with our back office and foreign exchange departments to provide for quick and efficient execution. For many of our first-time clients our advisors are more than happy to sit and talk you through your trades and provide a level of comfort that only boutique firms such as Birchwood Advisors can.

Foreign exchange services

Many of our clients live and work abroad and hold assets around the world so we have developed global relationships designed to quickly and efficiently facilitate trades on all major exchanges and in all major currencies at prices and rates typically reserved for larger Institutional firms.

Alternative Investments

As part of our service to offer a complete spectrum of investment opportunities designed to provide the very best of returns whilst protecting our clients' capital, our highly trained advisors are encouraged and supported by our connections in the investment community to recommend both traditional as well as non-traditional investments. Whilst generally being considered somewhat riskier than traditional investments, alternative investments often meet and exceed our requirements for the trade-off between risk and return and when they do we can offer our clients opportunities far superior returns that are normally only accessible to sophisticated as well as institutional investors.

Private Equity

Having established trusted long term relationships with some of the world's leading private equity firms, we are often able to gain access for our clients into select private equity investments through direct deals and select private equity funds, but only after these opportunities have been thoroughly evaluated and passed our strict criteria in order to be approved by our product experts.

Pre-Ipo

Leveraging upon our connections as well as our extensive access to leading research and analysis we are often invited to take part in fund raisings for pre-initial public offering (IPO) shares. These opportunities are usually reserved for connected parties and the investment banks leading the listing process, but occasionally are made available to private wealth managers such as our firm in order to broaden the shareholder base before listing.

Angel Investments

Similar to both private equity and pre-ipo investment opportunities, from time to time our research generates very early stage opportunities available for investment which meet our strict criteria for risk and reward. We only offer such opportunities as part of our overall assessment of our clients' individual risk profile so are not generally available to all of our clients. Once we take a position in angel investment opportunities we stay the course as it processes through subsequent private equity fund raising stages and onwards through the pre-ipo structuring and offering and to the eventual listing of the company on a public stock exchange.

Wealth Protection

We are highly experienced in advising on and setting up appropriate strategies to protect our client's wealth and can provide advice on retirement planning, protection of assets, estate and succession planning as well as the complexities of holding global real estate, regional mobility of funds and specific taxation issues.

Personalised Planning

Many of our larger family business clients and a growing list of our wealthier high net-worth clients view their wealth management plans in a broader sense, taking account of issues apart from those of a financial matter. In recognition of this and as part of our desire to provide our clients with an all-encompassing service, we have trained many of our advisors to provide advice and guidance to those clients wishing to expand their philanthropy, set up appropriate investments for family structures and provide for their next generation of family.

Family Services

Family Structures

In so many ways family businesses contribute above and beyond financial rewards but often face complex issues which many other businesses don't. Whilst many of our Asian clients have family business that have been operating through many generations they are struggling to adopt and keep up with the change in technologies. Our advisors are well versed in understanding these challenges and we can often provide significant and valuable advice to many of our clients operating within family structures.

Succession planning

After having established a trusted relationship with our clients many of them choose to have us help them structure their investments to provide for the smooth transfer of their wealth as an integral part of their wider wealth succession structures. As part of our service our advisors are trained to talk through the issues and advise clients as to the creation of distribution strategies and the appropriate structures that are needed in order to make the process as smooth and painless as possible.

Philanthropy

We understand that many of our high net-worth clients want to channel some of their wealth and yielding investments towards social endeavours or charitable organisations so we have developed a deep understanding of the options available and the taxation implications of such strategies.

Wealth Fortification

Bringing it all together is important and we stress right from the beginning of any relationship with our clients that they consider the appropriate structures and investments that take account of a range of issues incorporating retirement goals, succession planning, charitable endeavours and the over-riding protection of the wealth that they have generated.

Environmental Conciousness

As part of our investment screening process we take account of socially responsible investing (SRI) principles and opportunities and delight in offering our clients outstanding investment opportunities that are sustainable, socially conscious and both ethical and green in nature. We look forward to discussing with you how to invest in stocks and bonds that promote SRI principles and that offer superior returns that meet your investment and risk profile.

BIRCHWOOD
ADVISORS

Get in Touch with Us

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