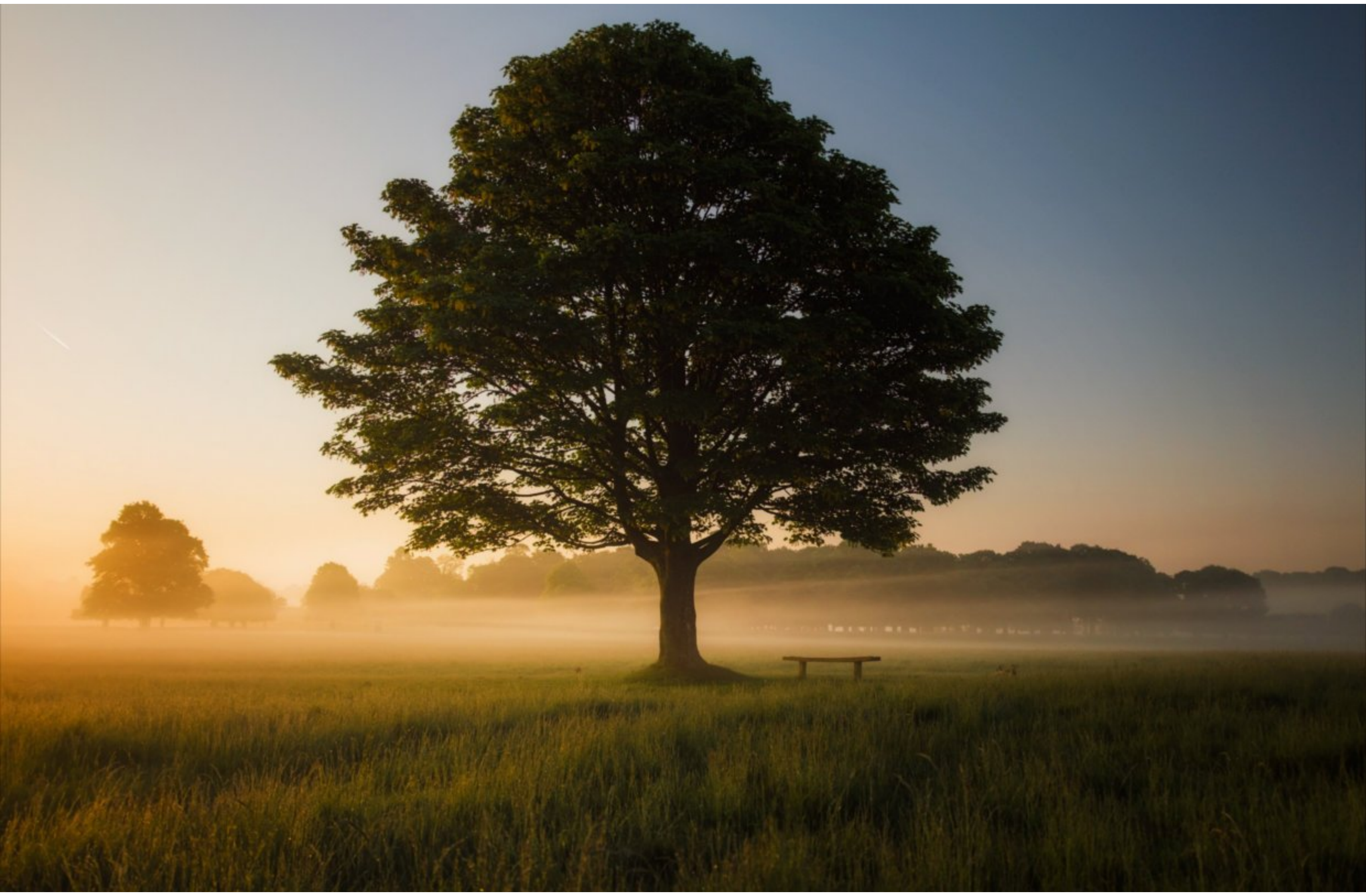
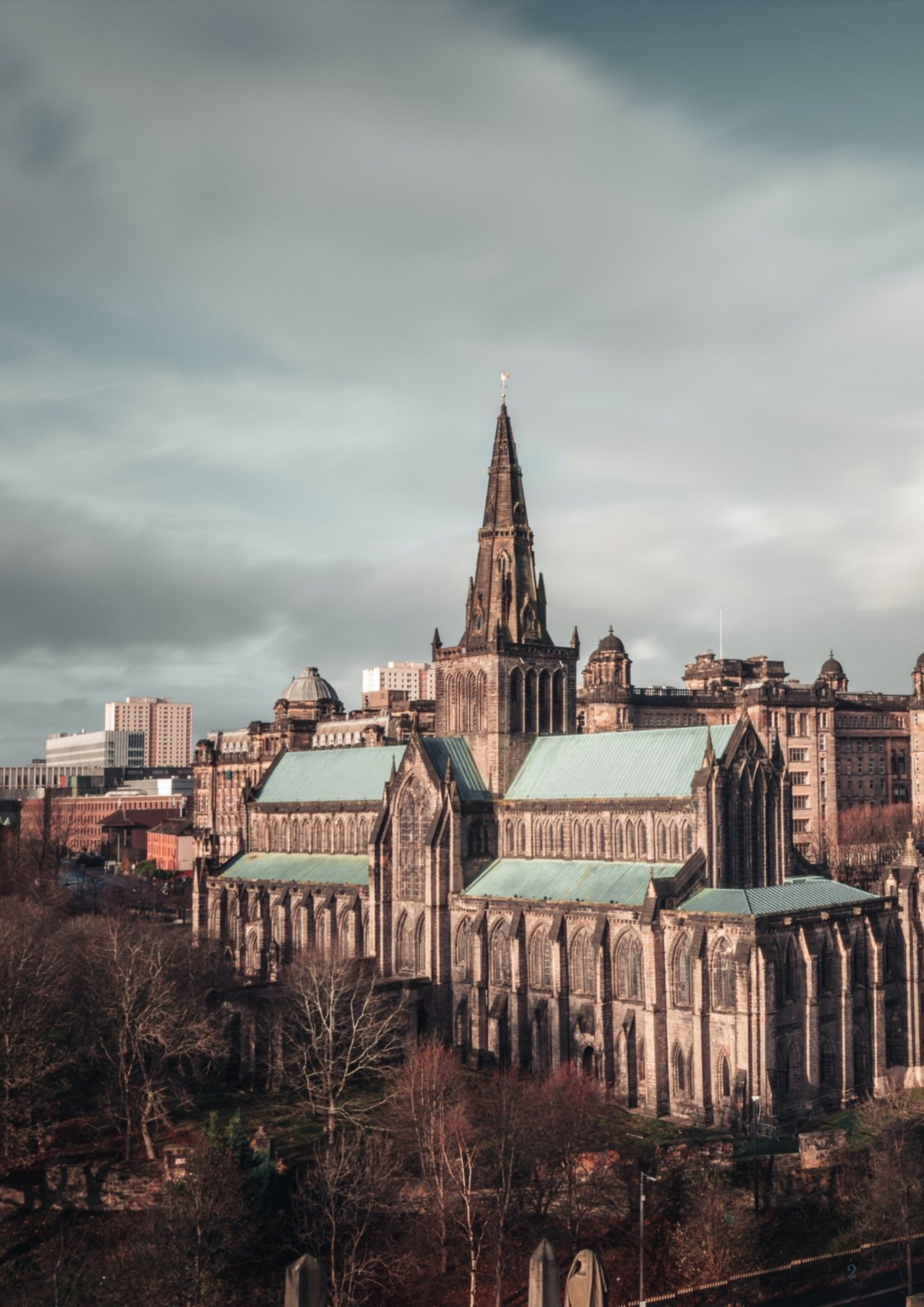
Campbell Alexander Financial Management Ltd
Personal and Corporate Financial Planning



Helping people achieve financial security & prosperity through our expertise.



ABOUT US

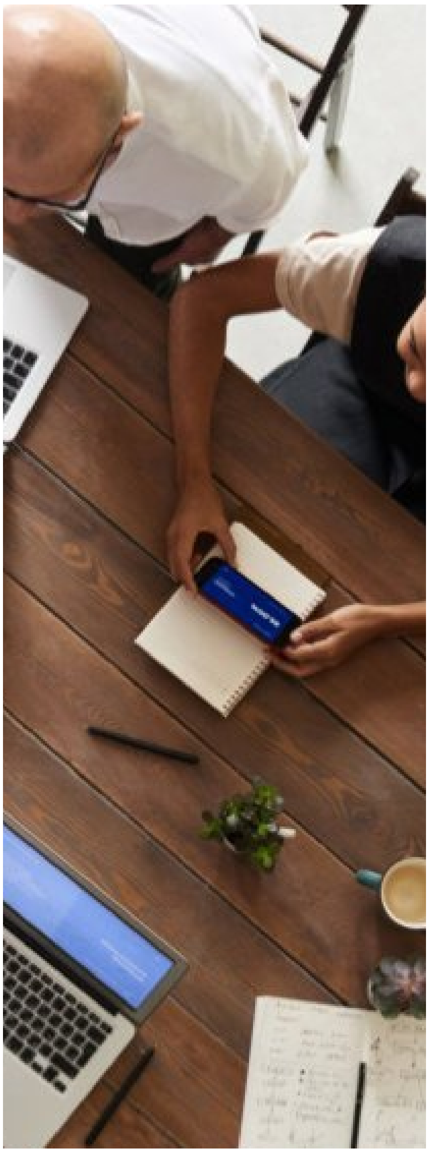
Campbell Alexander Financial Management are professional wealth advisers. We deliver high quality financial advice, providing a financial pathway to a better future for you and your family or business. We are supported by an extensive team of experts in all relevant field.

Investments are one of the key elements of financial planning.

Campbell Alexander Financial Management are here to guide you and advise on what investments, regular or lump sum, are exactly right for you, given your unique personal circumstances.

Saving and investing is about balancing the risks you are comfortable with alongside the potential rewards. As a general rule, the higher the risk, the bigger the potential rewards - but also the greater the potential losses.

We believe investment objectives should be for the long-term. Your investment goals and attitude to risk are personal and may change over time, particularly as you near retirement. You will probably find you need to review your approach to investing as time goes on.



OUR SERVICES

Creating a comprehensive and robust financial plan is the best way to ensure your future financial security and wellbeing.

Fact Find

An opportunity for us to learn more about your needs and objectives.

Financial Plan

We work together to develop a comprehensive financial plan for your needs and objectives.

Portfolios

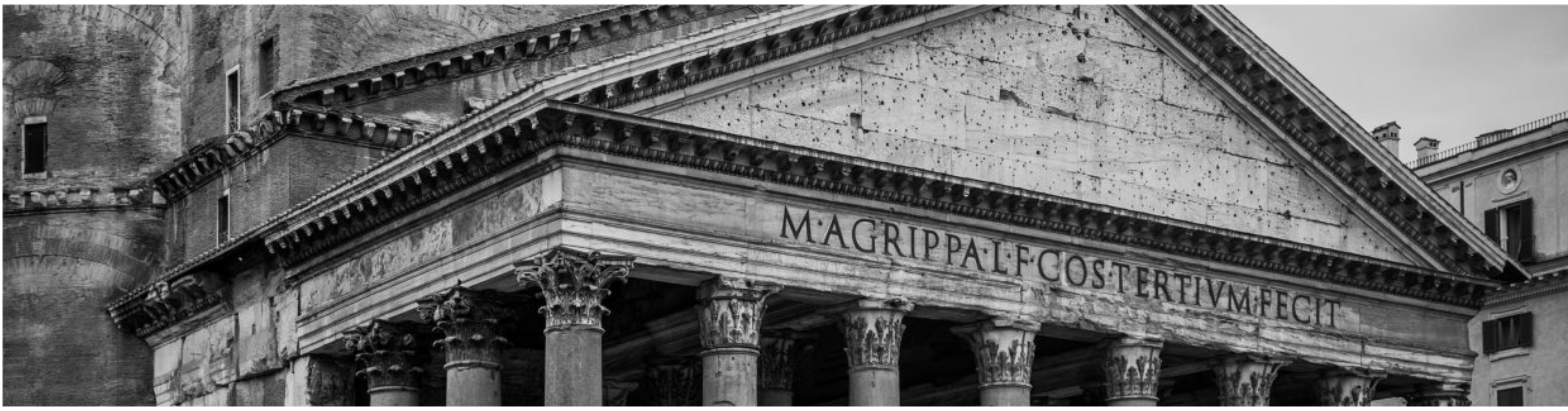
We may recommend a suitable portfolio of investments to align to part of your financial plan.

Review & Reporting

A regular review and ongoing reporting helps keep your plan and investment on track.

Whether investing for long-term growth, preserving capital ahead of retirement, or making withdrawals to provide a retirement income, we offer a range of investment options to align to your needs and objectives.

OUR INVESTMENT PHILOSOPHY



Our investment philosophy is to focus on getting the right mix of assets or "asset allocation" to align to your needs and objectives.

The mix of assets - the proportions invested in Equities, Bonds, Alternatives & Cash Equivalents - is the main driver of portfolio risk and return.

Risk and return are the two sides of the same coin, so it's key to get the balance right for you.

Whilst very long-term investors can take a more long-term approach, for most investors, understanding and managing investment risk is key. Capital markets don't stand still, and nor should your investments. Ensuring they remain up-to-date with changing market and economic conditions is key to ensuring returns remain on track, and risk budgets remain in check.

Our portfolios are built for our clients to deliver on clearly defined objectives, with rigorous risk controls. They are managed by our appointed investment manager, Elston Portfolio Management, and overseen by our investment committee.

As with all investments where capital is at risk, the value of investments may go up and down and you may receive back less than you invested originally invested.

OUR INVESTMENT PROCESS

Strategic Allocation
The mix of assets to deliver the long-term objectives.

Portfolio Construction
Selection of funds to implement the portfolio.

Objectives & Constraints
Building each portfolio to align to a risk profile.

Dynamic Allocation
Adjustments to the mix of assets to adapt to changing market conditions.

Analytics & Reporting
Detailed risk analytics and insightful client reporting.

Our portfolios are built and managed to align to the needs and objectives of our clients and are overseen by our Investment Committee.

Our appointed investment manager has been selected based on their professionalism and expertise.

Our portfolios are broadly diversified across and within asset classes, with a keen focus on liquidity, transparency and value for money.

OUR MODEL PORTFOLIOS

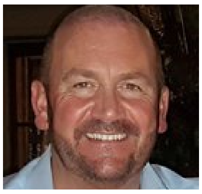
The CA Portfolios have been designed to meet the needs and objectives of our clients and provide a cost efficient, well-diversified multi-asset portfolio for a range of risk profiles.

Portfolio Range	About this range
CA Portfolios	For clients looking to grow their wealth, with a focus on asset allocation to deliver the risk-return objectives. Portfolios are constructed with a blend of both actively-managed (for potential outperformance) and index-tracking funds. Available in five risk profiles.
CA Retirement Portfolios	For clients looking to make regular withdrawals as part of their retirement income. Four risk profiles available.

The CA Portfolios are overseen by our Investment Committee and managed by our appointed investment manager that selects appropriate funds on a whole-of-market basis. For more information, please speak to one of our advisers.

OUR INVESTMENT COMMITTEE

Our Investment Committee combines theoretical expertise with years of practical experience.



Derek Campbell, Director
Campbell Alexander Financial Management

Sinead McDevitt, Techincal Consultant
Campbell Alexander Financial Management

Henry Cobbe CFA,
Elston Portfolio Management

Hoshang Daroga CFA, Investment Director
Elston Consulting

ABOUT US

Our Investment Committee uses the resources and insights of external professionals to support decision-making and to ensure a culture of challenge.

Campbell Alexander Financial Management is a modern company of professional wealth advisers. We believe very strongly in providing high quality financial advice to our clients.

Elston Consulting was established in 2012 and provides research, analytics and insights to wealth managers and financial advisers. Elston Portfolio Management provides discretionary managed portfolio services to financial advisers and is the appointed investment manager for our model portfolios.

CONTACT

Find out more
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Your Capital is at risk, the value of investments may go up and down and you may receive back less than you invested originally invested. Investments should be considered over the longer term and should fit in with your overall attitude to risk and financial circumstances.

Campbell Alexander Financial Management is authorised and regulated by the Financial Conduct Authority.

Registered in Scotland: Registered address: Yett Farm, Woodhall Road, Braidwood, South Lanarkshire ML8 5NF Registered Number: SC419347

Campbell Alexander Financial Management is entered on the Financial Services register under reference 794406

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