



Summary of Services

A⁺dvisory plus

Advisory+ is designed for investors who would like to create their own portfolio but would also like to have the assistance of an expert opinion on some, if not all, of their investment decisions.

Suitable for sophisticated market-savvy investors that wish to maintain control over their assets. At the same time they demand expert advice when it comes to providing suggestions and a short-list of suitable 'best-of-breed' assets for final approval.

- Available via PPB or Platform
- Minimum US\$500K (or equivalent)
- Advisory mandate - client input and communication
- Research and analysis on request
- Analysis available for client's current portfolio
- Private bank account available

Capital Management

Capital Management portfolios are bespoke, micro-managed by a specialist manager within pre-determined parameters set by the Elgin Investment Committee.

Direct access to portfolio managers granted for queries regarding rationale and investment decisions.

*Conservative strategy platform only

- Available via PPB or Platform*
- Minimum \$/£/€ 100K
- Discretionary management mandate
- Bespoke portfolios via proposal
- Analysis available for 100K minimum portfolio
- Private bank account available

Capital *Lite* Management

Capital Management *Lite* service is available at a lower entry level and is suitable for investors to choose from a range of risk-rated, managed portfolios.

*Conservative strategy platform only (min. 50K)

- Available via life co's (UL) or Platform*
- Minimum \$/£/€ 25K or Life Co. minimums
- Discretionary management mandate
- Can accept ad-hoc or scheduled top-ups \$/£/€ 5K minimum

Capital Builder

Capital Builder service compliments life company regular savings plans with monthly or quarterly contributions designed to facilitate investments into a range of managed, risk-rated portfolios in order to generate a sum of cash for the future.

- Available via life companies
- Minimum \$/£/€ 500 p.m.
- Discretionary management mandate

Global Thematic

Thematic portfolios are an excellent way to achieve an extra level of diversification in a portfolio, particularly as part of a core/satellite strategy.

Current Themes are:

- Income Builder - Growth profile available in USD or GBP consisting income generating assets
- Best Ideas - Growth+ profile available in USD, EUR & GBP consisting our 'Best Ideas'

- Available via Elgin Platform only
- Minimum \$/£/€ 25K
- Can accept ad-hoc or scheduled top-ups \$/£/€ 5K minimum
- Discretionary management mandate



Product Build Guide Summary

Case profile

Services available

- Life Company regular premium only



- Life Company Single premium Unit-linked
- Ad-hoc or regular top-ups minimum \$/£/€ 5K



- Platform single premium \$/£/€ 25 - 100K
- Ad-hoc or regular top-ups minimum \$/£/€ 5K



- Platform or Life Company PPB \$/£/€ 100K
- Ad-hoc or regular top-ups minimum \$/£/€ 5K
- Private bank on request



- Platform or Life Company PPB over 500K USD or currency equivalent
- Ad-hoc top-ups minimum \$/£/€ 25K
- Private bank on request

