BRIGHTON CAPITAL

MANAGEMENT

Brighton Capital Management is a specialist firm of highly qualified wealth managers, with over 125 years' experience, based in Britain's most vibrant city. Our goal is to build enduring long-term relationships to get the best financial outcomes for our clients and their families.

We cater for a wide range of clients, but in most cases the primary objective is to protect and grow the value of wealth over the long term. We actively manage portfolios to seek the best possible returns within the risk framework that has been agreed with each client.

Our discretionary investment management service allows investors to focus their time and energy elsewhere, safe in the knowledge that our team of professionals fully understand their needs and goals, and are ready to act decisively on their behalf.

We strive to provide clients with holistic solutions for their investment and financial planning needs. These solutions may or may not involve specific products because it is the beneficial outcome for our clients that is of primary concern.

Our aim is to understand the important things in our client's lives and help them achieve their short, medium and longer-term financial goals in the most efficient way. Together with bespoke investment management, we offer advice around the key areas of:

- Inheritance tax planning
- Trusts
- Retirement planning
- Succession planning
- Tax efficient investments and savings
- Insurance and protection

DELIVERING VALUE TO OUR CLIENTS

Brighton Capital Management has the experience, expertise and flexibility to provide investment and wealth management services that are perfectly tailored to suit the needs and objectives of each individual client.

As a boutique firm, we have the freedom to work with a wide range of partners and the latest technology to guarantee that our solutions are tailored to your precise needs and circumstances.

Brighton Capital Management is founded on the following principles:

Quality of service

Effective financial planning and wealth management is an ongoing process and our goal is to work with clients and their families over many years and decades. We recognise the importance, therefore, of providing an approachable, expert and joined-up service, and of being available to clients when required, even outside of normal business hours.

Transparency

We believe it is vital that we work closely together with our clients to set out and achieve their goals. A key part of that process is ensuring that the information and advice we pass on is accurate, clear and free of jargon. Our fee structures are also transparent and we do not impose hidden or extra charges.

Flexibility

As a boutique firm, we are not bound by rigid corporate structures and administrative systems. This means we have much more freedom to choose the most suitable approach to investment and financial planning on a personalised, client-by-client basis.

Local knowledge

Our experience working in Brighton and on the south coast has enabled us to develop close relationships with a number of leading local accountants, solicitors and specialist advisers – the benefits of which we can pass on to our clients.

ASSET PROTECTION

The security of our clients' money is of utmost importance to us here at **Brighton Capital Management**.

We have the flexibility and the dynamism to offer our clients an unparalleled wealth management service. But we also understand that it is vital to protect our clients' investments. That is why we have partnered with Raymond James Investment Services who appoint Pershing Securities Limited (PSL), to ensure the accounts of all our investors are safeguarded appropriately. Raymond James is responsible for administering your accounts while PSL acts as custodian for your investments.

PSL is part of the Bank of New York Mellon Corporation, one of the world's strongest financial institutions with many trillions in client assets under custody and/or administration.

OUR SERVICES

Integrated Wealth Management

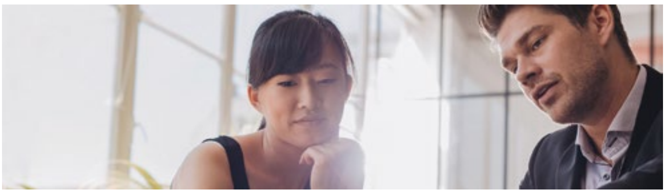
Our "big picture" approach to your investment, pension, tax and estate planning needs will ensure you achieve your financial objectives.

Financial Planning

Our approach to financial advice involves a comprehensive analysis of your needs, concerns and long-term goals.

Charity giving and philanthropy

We can advise and assist in creating a tax-efficient way for you to donate to worthwhile causes.



Supporting the entrepreneurial cycle

We help business founders through every stage of the entrepreneurial cycle, from startup and growth to consolidation and exit.

Creating a life plan

We provide a holistic overview of your current financial situation and aspirations to develop a long-term strategy to help you achieve your life goals.

Ethical and socially responsible investment

Our portfolio management service can help you maximise investment returns without compromising your values.

Protecting and growing family wealth

We ensure that your family's financial affairs are handled efficiently and effectively, with an eye to the long-run.

OUR TEAM

DAVID PEGLER
Chartered FCSI
Wealth Manager – Principal

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David has over 30 years of investment experience working for some of the world's most prestigious firms including Cazenove, UBS and Brewin Dolphin. His key skills are investment communication with private clients, charities and intermediaries in the UK, together with portfolio construction and technical analysis. He is a chartered fellow of the Chartered Institute for Securities & Investment.

SYLVIA BOWEN
Chartered FCSI
Wealth Manager

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Sylvia is a qualified chartered Fellow of the Chartered Institute for Securities & Investment. This signifies that she has a high level of not just knowledge and skills but also integrity to work with private individuals, intermediaries and trustees in relation to taxable investment portfolios, personal ISAs and pension funds. She's spent over 20 years in the industry and has worked for Brewin Dolphin and UBS.

EWEN EMMERSON
Chartered FCSI
Wealth Manager – Principal

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Ewen originally trained as a stockbroker and financial adviser, and has spent more than 15 years working with clients on the south coast. As an investment manager and broker he provides bespoke portfolio solutions and advice to both private and institutional clients. He is highly qualified across a wide range of investment disciplines and as a Chartered Wealth Manager, he brings a vast range of experience to help tailor our investment solutions to the wide-ranging needs and objectives of our clients.

JASON BRIGGS
DipPFS
Paraplanner

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Jason has over 20 years experience in Financial Services, the majority of which have been as a Paraplanner. He started his financial career at Standard Life then moved to the other side of the fence and began working for several boutique financial planning firms. This eventually led to Jason working at Brewin Dolphin where he worked closely with Francis over the course of many years.

FRANCIS JARMAN
FPFS Chartered
Financial Planner TEP

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Francis has worked in the financial services profession for more than 30 years at such high-calibre companies as AXA, Barclays, Coutts & Co, UBS Wealth Management and Brewin Dolphin. He was one of the first advisers in the UK to achieve the profession's gold-standard qualification as a Chartered Financial Planner and is also a Fellow of the Personal Finance Society. Francis has been a committee member on the Personal Finance Society Sussex region for a number of years. Francis advises on all aspects of financial planning including life protection, pensions, inheritance tax and investments.

KATY LAPPIN
Office Manager

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Katy has a strong background in business administration, having worked in this area since leaving college. She joined the team at UBS Wealth Management as an Administrator, then onto Brewin Dolphin where she managed the administration team whilst also providing assistance to the Directors. Katy has an NVQ in Business Administration and has attained Level 3 in the Chartered Institute for Securities & Investment qualification.

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