



STRATEGIC PARTNERSHIPS

Brooks Macdonald

More than investment management

A strategic partnership for ambitious independent advice firms

*Realising Ambitions.
Securing Futures.
We are Brooks Macdonald.*



WHY BMSP?

The advice market is changing. We believe investment partnerships need to change with it.

At Brooks Macdonald, we no longer believe it is enough simply to provide our IFA partners with market-leading investment products, strong performance and excellent service.

The advice market is changing. Consolidation is creating larger, increasingly well-resourced competitors with advantages in technology, marketing, operational efficiency and scale.

For successful independent advice firms, remaining independent and continuing to compete therefore requires more than simply having access to a strong investment proposition. We believe an investment partner should be prepared to go further.

BMSP: helping strong independent businesses compete on their own terms

Consolidation



Larger competitors



Greater scale



**Pressure on
independent firms**



Investment management remains at the heart of what we do. BMSP is about what we can do around it to help strengthen your business.

WHY BROOKS MACDONALD?

Sharing the benefit of our own scale and experience

Brooks Macdonald has the benefit of operating alongside a substantial financial advice business within the Group.

That gives us first-hand insight into many of the same challenges facing our IFA partners – from technology adoption and operational efficiency to client engagement, adviser capacity, profitability, growth, succession and enterprise value.

Through BMSP, our ambition is to share the benefit of that experience, capability and scale with our strategic partners.

We are not seeking to run your business. We are seeking to help you make it stronger.



Supporting the future of independent advice

There is no single destination.

Some firms want to:



Grow adviser numbers



Win more clients



Increase profitability



Improve operational efficiency



Create capacity



Compete more effectively locally or nationally

Others want to:



Reduce dependency on individual owners



Strengthen management



Prepare the next generation



Build enterprise value



Create a succession plan



Prepare for an eventual exit

Four capabilities. One strategic partnership.



Investment excellence & client experience

Market-leading portfolios, competitive performance and a high-quality client experience — built on strong governance and consistency.



Business consultancy & value creation

Helping firms understand what drives the value of their business and building a structured plan to improve it — from profitability to succession.



Technology proven in practice

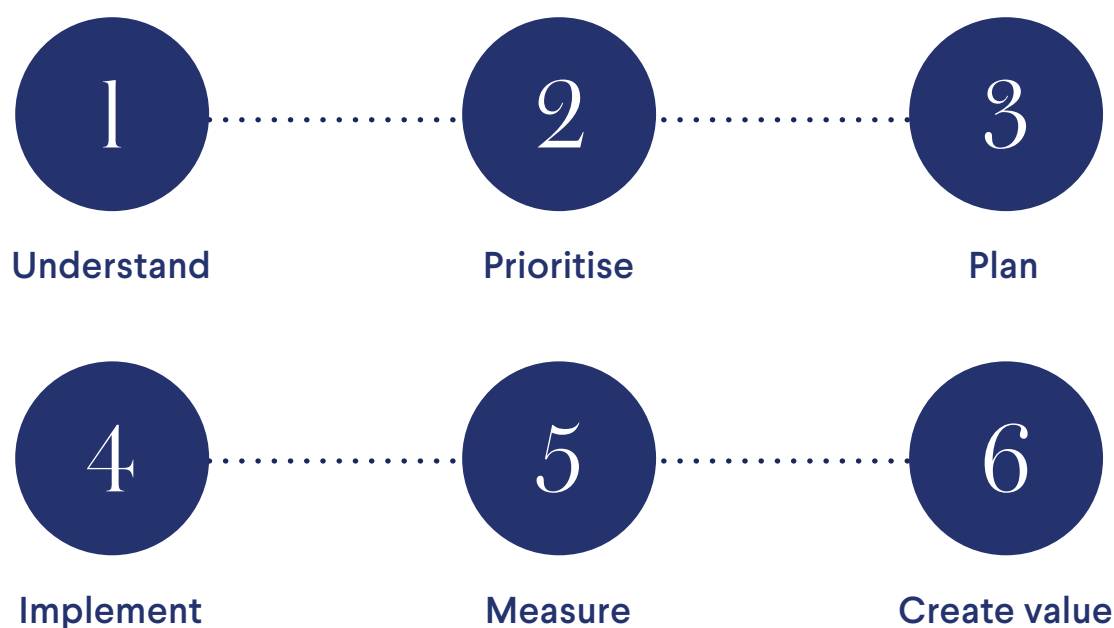
Technology first tested and proven within our own advice environment — reducing administration and increasing adviser capacity.



Marketing & client engagement

Practical support to deepen relationships with existing clients and attract new ones, from content and campaigns to events.

Building a stronger and more valuable business



BMSP begins with understanding the ambitions of the firm and what its shareholders want the business to become. Working collaboratively, we help identify the factors with the greatest potential to create value over time, including:

- Revenue growth
- Increasing assets under advice
- Improving adviser productivity
- Increasing recurring revenue
- Reducing operational friction
- Improving client segmentation
- Creating management capacity
- Strengthening succession arrangements

**Enterprise value is an outcome of building a better business
— not simply something to think about when it is time to sell.**

Turning scale into practical advantage



Technology

Proven in our business before being offered to yours.

Technology within BMSP is intended to solve real operational problems rather than simply add more software, focused on:

- Capacity & efficiency
- Client servicing
- Investment implementation
- Workflow & data
- Consistency
- Scalability



Marketing

Helping you engage the clients you have – and reach the clients you want next.

- Client education
- Campaign support
- Co-created content
- Client communications & events
- Digital assets
- Lead generation & prospect conversion

A smaller independent firm can increasingly access the capabilities normally associated with much larger organisations.

Committed to the future of independent advice



Our commitment to BMSP reflects a wider belief in the importance of a strong, sustainable independent advice sector.

For us, succession is not simply an event at the end of a business owner's career. It is part of a broader conversation about creating stronger businesses, developing the next generation of leadership and giving owners greater control over their eventual destination.

BMSP complements that philosophy by helping firms build value and optionality well before a transaction is contemplated.

Growth and succession are part of the same journey

Growth

Resilience

Value
Creation

Succession

Optionality



The stronger the business, the more choices its owners ultimately have.

BMSP does not represent a commitment by either party to a future transaction — membership does not commit a firm to sell, nor does it commit Brooks Macdonald to acquire.

A founding partner in the future of succession planning

Brooks Macdonald is proud to be a founding partner of the Succession Alliance — an independent, sector-wide initiative helping advice firms address the long-term challenges of succession, business continuity and the transfer of ownership.

Our involvement extends beyond BMSP itself. It reflects a broader commitment to the health of the independent advice profession — working alongside other firms and industry specialists to raise standards and share best practice in succession planning across the market.



**Founding Partner —
The Succession
Alliance**

Why this matters for BMSP partners



Independent validation

Credibility that sits outside Brooks Macdonald's own narrative — a third-party signal that our approach to succession reflects genuine industry best practice, not just our own view of it.



Broader than one firm

Access to expertise, frameworks and thinking drawn from across the wider profession, not solely from within Brooks Macdonald.



Proof of intent

A tangible demonstration that BMSP is about helping owners build stronger businesses and create genuine options — not a route to positioning Brooks Macdonald for an eventual acquisition.



Our support for the Succession Alliance is proof that this is about helping owners create options — not about positioning Brooks Macdonald for an eventual acquisition.



What could your business become?

Every advice business is different. Its ownership, ambitions, clients, people and eventual destination are unique.

That is why BMSP does not begin with a predetermined solution. It begins with a conversation about where your business is today, where you want it to go and what might help you get there.

**Our ambition is not simply to be your investment manager.
It is to become a strategic partner in the future of your business.**



Start a strategic conversation with Brooks Macdonald



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