

# Guide to Close Investment Accounts



## What is an investment account?

Our investment accounts let you invest in UK stocks and shares, deposits, gilts, managed funds and exchange traded funds (ETFs), so you can create an investment portfolio that's right for you. If you have already invested the full amount into an ISA, our investment accounts give you another way to invest, with no maximum limit.

## Why Close Brothers?

- All your investments in one place and traded online.
- Wide choice of funds, shares and ETFs.
- Reshape your portfolio as your needs change.
- Create different accounts for specific financial goals.
- Access to our UK based Investor Support Team to help you with any enquiries.

## Build your ideal portfolio from a wide range of investments, all available to trade online

If you have used up your ISA allowance for this tax year, our Investment Account offers an excellent home for your other investments. You may hold as many investment accounts as you choose.

You can choose from an extensive list of funds from Close Brothers Asset Management and other fund managers, as well as equities, gilts and Exchange Traded Funds (ETFs).

With such a wide range of options all held in one account, you can build a diversified portfolio and adjust it quickly and conveniently online in response to market conditions, or as your investment objectives change. Save regularly from £50 per month. There is no minimum lump sum.

## Are there any risks?\*

- You should always remember that investments can fall as well as rise in value and you may get back less than the amount you originally invest.
- Specific risks will apply to individual investments and you should familiarise yourself with them before investing.

\*For a better understanding of the risks involved with an Investment Account, please see our Close Brothers Self Directed Service Key Features and Charges document.

# Questions and answers

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## Q How do I search for available Close Investments?

All available investments can be found in the 'Search Investment' menu on your online Summary screen. If you know what you are looking for you will be able to quickly find your investment using the search bar, or you can refine your search using the available filters and shortlists available.

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## Q Can I set up a Regular Contribution into my Investment Account?

You are able to set up both regular cash contributions and regular investment contributions into your online accounts. These can be set up by clicking on the 'action' button on the summary screen for the account you wish to create a new regular instruction for. There will be details on screen to get you started and outline any minimum or maximum contributions.

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## Q Are there any restrictions on what I can hold in an Investment Account?

You can hold any investment available on the portal in an Investment Account. This includes: UK stocks and shares, deposits, gilts, managed funds and exchange traded funds (ETFs).

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## Q How much do I have to pay in to open an Investment Account?

There is no minimum investment required to open an Investment Account. You can also opt to set up regular contributions starting from £50 per month.

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## Q What if an investment I want to buy isn't available?

We regularly review the investments we offer on the client portal. If an investment you are interested in buying isn't available, please contact the Investor Support Team.