

Investor Visa Service Specialist Services



At a Glance

- ▶ Active management of portfolio assets
- ▶ Benchmarked portfolio
- ▶ Sophisticated portfolio design and investment selection process
- ▶ Regular portfolio reviews

Overview

Our Investor Visa Service provides you with investment solutions that comply with the criteria of the Investor Visa Programme.

Your dedicated Investment Manager will listen to your individual investment needs, tolerance to risk and your investment time horizon to establish a portfolio that is consistent with your return objectives. Investment options include:

- ▶ 100% UK Equities
- ▶ 75% UK Equities and 25% Corporate Bonds/Gilts
- ▶ 50% UK Equities and 50% Corporate Bonds/Gilts
- ▶ 25% UK Equities and 75% Corporate Bonds/Gilts
- ▶ 100% UK Corporate Bonds/Gilts
- ▶ 100% UK Government Gilts



Highlights

What Do Applicants Need to Qualify as a UK Investor?

- ▶ They will have access to not less than £1 million of their own money that they will take to the UK, and which must not be held in trust, or
- ▶ Their own personal assets which, taking into account their liabilities, are worth more than £2 million, and
- ▶ They have not less than £1 million under their control in the UK (this can include money loaned by a financial institution regulated by the Financial Services Authority)

What Else Do Investors Need to Show?

- ▶ They intend to invest no less than £750,000 in active and trading UK-registered companies or UK government bonds
- ▶ They intend to make the UK their main residence, and
- ▶ They can support themselves and their dependants and live without having to work as an employee and without help from public funds

Information taken from www.ukvisas.gov.uk. As immigration rules may change please reaffirm all information with the Home Office.

Investment Process

Once we have determined your risk preference, we will recommend a suitable portfolio with the ideal mix of assets to meet your needs and risk profile.

After arriving at a strategic asset allocation, we employ active management techniques to select the individual securities. We are dedicated to reviewing your investments on a regular basis and making necessary adjustments in accordance with the changing economic environment. You have the reassurance of a highly disciplined investment process with in-depth monitoring and controls.

Contact Us

To learn more, speak to your HSBC Relationship Manager or contact us at:

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