



RDR Status

W1M Asset Management Limited
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Independently Owned

W1M are solely owned by the firm's management team and continue to operate an independent investment strategy. The firm is not owned or influenced by any third party.

Investment Services

Under the descriptions provided by the RDR, we shall provide our clients with "restricted advice". This means that we will be offering advice from a selected range of providers, platforms and custodians. We have a custodian who we generally recommend, Royal Bank of Canada, but we are able and do use others when suitable or relevant.

We continue to focus on providing investment solutions where we are most accomplished and have flexibility to invest in all types of investments in line with the strategies and profiles agreed with our clients.

We continually monitor our providers and custodians to ensure our clients receive optimal cost, service and performance.

Past performance is not a reliable indicator of future results. The value of investments and the income derived from them may rise as well as fall, and investors may not get back the amount originally invested. Capital security is not guaranteed.

This material is provided for informational purposes only and does not constitute investment advice or a recommendation. It should not be considered an offer to buy or sell any financial instrument or security. Any investment should be made based on a full understanding of the relevant documentation, including a private placement memorandum or offering documents where applicable.

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