PITCH DECK MAR 2024

All publications are directed solely at professional financial advisors.

WHO WE ARE

AMI has established itself as one of the most forward thinking and innovative financial services distribution companies in the market. This has been achieved by actively seeking out growth opportunities coupled with continuous product development. Our rapid expansion is built upon a core range of principals that include a primary focus on risk, liquidity & underlying investment mandate, as with all investments it is essential to understand the risk and the opportunity.

Our culture is one of ambition and progression, whilst we focus on delivering a high level of service, with proven results. AMI has access to a wealth of expertise both in house and through utilising the resources of the group of companies which make up our carefully selected product range. Founded in 2005, AMI was established to bring together financial services groups that all share a common focus. We do this by carefully selecting investment managers and product providers that meet our strict criteria, after we evaluate a range of core competencies. The due diligence process is a key part of the AMI process and business model, which helps to determine the true expertise of the companies we work with.

AMI Financial Products Ltd

SOLUTIONS FOR **FINANCIAL ADVISORS** & PROFESSIONAL INVESTORS

Our comprehensive product range includes investment and currency solutions, retirement/succession planning and specialised wealth solutions, designed to minimise tax exposure.

Our products serve a range of clients, including affluent individuals, private banks & family offices through to government pension funds, across more than 40 countries worldwide.

1,000+
Followers

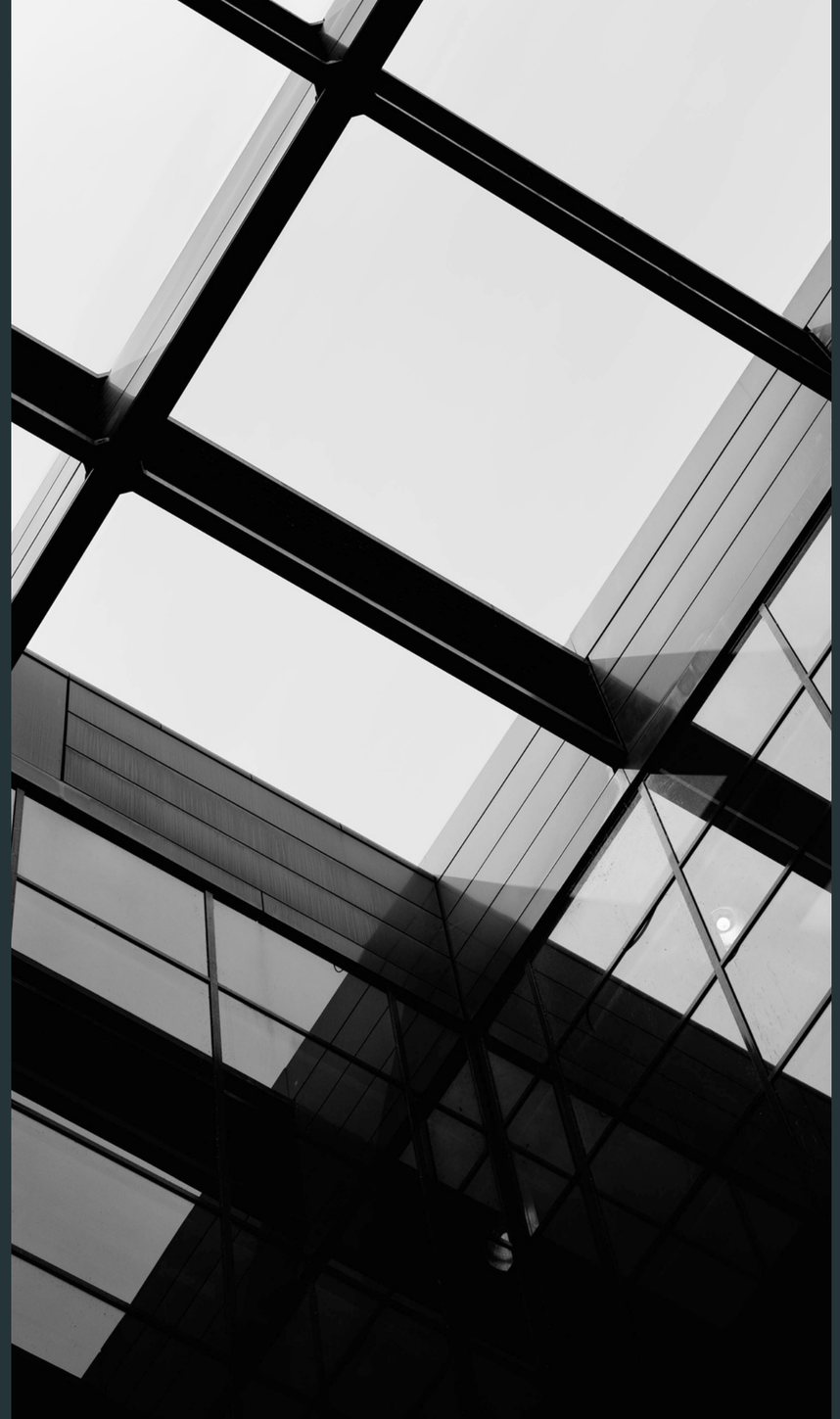
AMI Financial Products Ltd

WELCOME TO OUR **FUND SUITE**

Investment Platform
Universal Platform

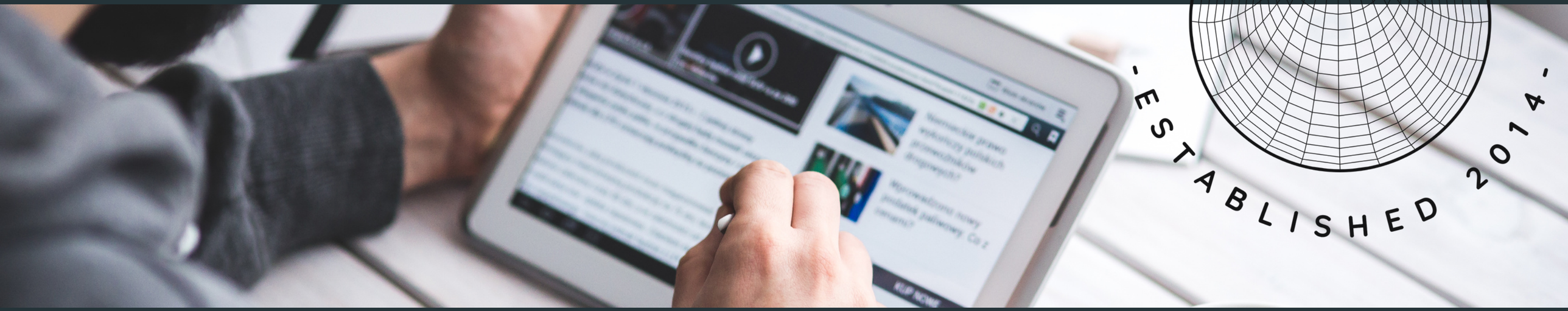
Mutual Funds
Fortis Mutual -
Fine Art Fund
Global Opportunities Fund

Bonds
Seven Stars Legal -
17.5% Income Bond 2025
17.5% Income Bond 2026



AMI Financial Products Ltd

OUR TRULY **OPEN ARCHITECTURE** INVESTMENT PLATFORM



The Universal Platform offers a selection of lump sum investment products that meet the requirements of all risk categories.
The open architecture platform and approach to investing provides the advisor with the control & flexibility they need to meet the changing needs of today's investor.
Mauritius offers foreign investors an extensive network of treaties and double taxation agreements ("DTA"s), making it the gateway for investments into, amongst other areas, India and African continent.

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FINE ART FUND

The Fund primarily invests in Fine Art of the highest quality sourced by a dedicated & experienced team of specialists. Fine Art has been an established market for over 30 years which is supported by performance analysis which demonstrates that the long-term trend in Art consistently outperforms other goods. Poor economic conditions drive investment into the asset class in a similar way to gold as the purchasing power of wealthy investors remains constant during troubled times. By applying modern securitisation techniques to capture the worldwide trend of increasing wealth amongst the super-rich, along with a spike in knowledge a much larger community has developed focussing on rare collectible assets. Fine Art can be used to protect wealth as well as appreciate in value & can be viewed as a short, medium or long term investment depending on a few key factors. The Global Art market was estimated at $65bn in 2021 recovering from the impact of the Coronavirus during 2020.

AUGUSTUS ADAMS
SINCE 1598
LONDON
FINE ART & ANTIQUES

- 1 Year+ Term
- Mutual Fund
- Fixed Income 12%p.a:
  1% paid income per month
- Debt Securitisation Vehicle
- Monthly Dealing
- Minimum Initial Investment of £125,000

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GLOBAL OPPORTUNTIES FUND

The fund invests in a broad range of global assets, including but not limited to; listed equities, bonds, funds, ETF's, private equity/VC and cash. Sectors include real estate, silviculture, agriculture, aquaculture, technology, commodities and sustainable investments. The investment manager utilises a strategic approach to each asset type, country and maturity spread, coupled with extensive due diligence and intensive analytical research. Core holdings will mainly be comprised of liquid, lower yielding, short-term investments with daily or monthly valuations. Satellite holdings in longer term, higher yielding investments such as secured bonds and private equity will provide an uplift in performance over the medium to longer term (5+ years). Whenever possible, the fund prioritizes investments which can demonstrate positive social impact and sustainability.

- 5 Year Term
- Mutual Fund
- 8 -12 % Target Return
- Monthly Dealing
- Socially Responsible
- Minimum Initial Investment of $25,000
- GBP & USD ISIN Codes

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SEVEN STARS LEGAL LIMITED

In a nutshell, litigation finance is when a third party invests in a claim, providing legal and associated fees, in exchange for a share of the profit. The idea is that a good legal claim is like an asset. It's worth money, but there's risk. The case is only worth money if you win in court.

Litigation finance has evolved from being a niche strategy to becoming a building block of an asset class that provides capital to unlock the value of assets in situations dependent on specific legal outcomes.

There is a fundamental reason why legal asset strategies such as litigation finance can offer a strong return to investors: the expected return on a litigation finance transaction is unrelated to the invested amount. This is truly unique.

GBP Bond 2025
Series No: S1 2025
ISIN: GB00BNYLM811
Currency: GBP
Min: £100,000
Maturity Date:
31st December 2025
Interest:17.5%
Interest payments:
June & December

LEARN MORE

GBP Bond 2026
Series No: S1 2026
ISIN: GB00BR88RN69
Currency: GBP
Min: £100,000
Maturity Date:
30th June 2026
Interest: 17.5%
Interest payments:
June & December

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LOOKING FOR OVERSEAS **PENSION & TRUSTEE** SOLUTIONS?

AMI work closely with providers offering HMRC recognised pension services, including Malta (EU) & Guernsey based solutions. We can also tailor bespoke trust services for HNWIs & their families.

Looking at IHT planning? We also hold long standing relationships with life assurance providers to bring a range of products and services to the professional advisor market.

Leading product issuers and top tier broker remuneration terms, means AMI could be the sourcing network of choice for most brokers.

Our advisor network and their HNW clients are always looking for high yielding investment opportunities and life assurance (plans up to $165m coverage) is an excellent option to consider.

LEARN MORE

AMI Financial Products Ltd

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