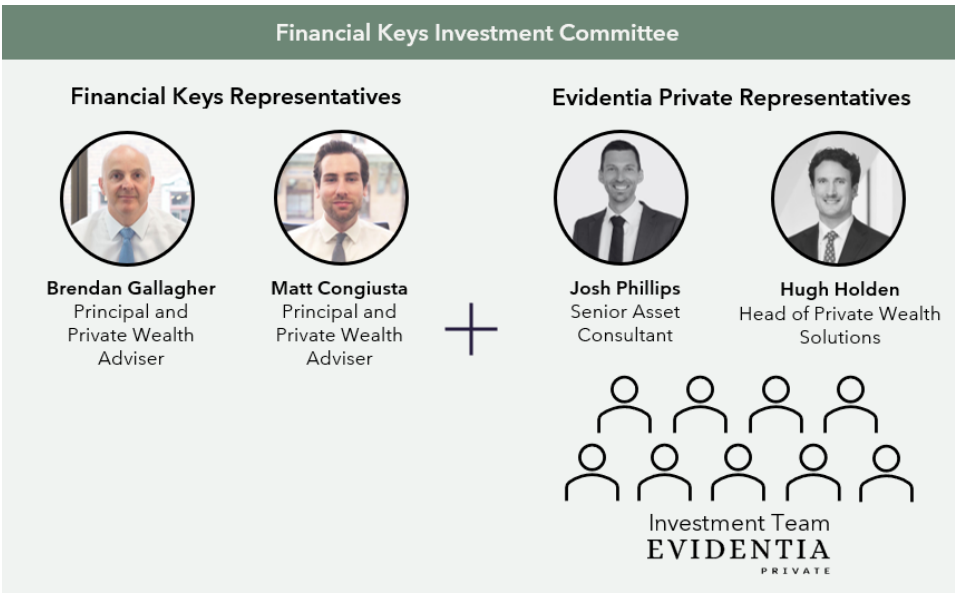


Financial Keys has built a strong reputation in financial advice and wealth management over the past 25 years by prioritising client interests, sound investing, and incorporating strategic expertise. We empower clients to make informed financial decisions that align with their priorities, fostering long-term relationships focused on financial wellbeing. Our tailored strategic advice helps clients grow, protect, and manage their wealth, supported by the expertise of the Financial Keys Investment Committee.

The Financial Keys Investment Committee is responsible for all investment research, portfolio construction, asset allocation, and risk monitoring. To enhance its capabilities, Financial Keys has partnered with Evidentia Private, whose research team supports the committee. Comprising representatives from both firms, the Financial Keys Investment Committee gathers monthly to discuss markets, performance and whether any actions are required. The Committee formally meets quarterly and engages as needed to respond to market developments and critical decisions.

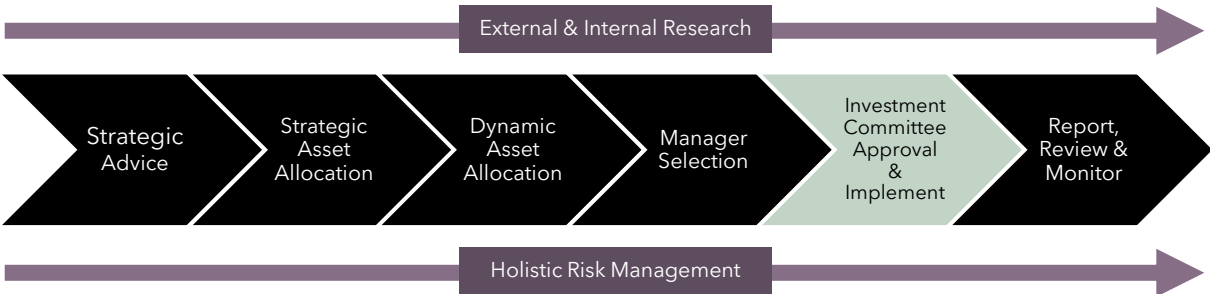


About Evidentia Private

Financial Keys has partnered with Evidentia as the asset consultant for our SMAs, strengthening our investment committee with their expertise. Evidentia designs and manages portfolios alongside top private wealth firms, specialising in multi-asset portfolios, equities, fixed income, alternatives, and private markets. With deep investment experience and insight into the financial advice industry, Evidentia aligns with Financial Key’s value proposition to deliver tailored, high-quality investment outcomes.

Our Investment Process

Strengthened by the key principles of our investment philosophy, our investment process can be broken down into a simple step-by-step process.



Ongoing review and monitoring

We provide a range of regular reports, insights and updates to keep you informed about investment market developments and performance.

	Document	Purpose	Frequency
	Quarterly Economic and Market Update	Regular update on market activity	Quarterly
	Quarterly Portfolio Update	Summary of the portfolio holdings	Quarterly
	Portfolio Change Notification	To notify you of any portfolio changes	Post trading
	Market Event Updates	Proactive information on market events	Ad-hoc

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