



WHISKY  
*Partners*

Creating  
*lasting partnerships*

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# About *Whisky Partners*

Whisky Partners are at the forefront of cask ownership, proudly helping our clients start and manage their unique portfolios. We're passionately leading the change, making every aspect of cask ownership as simple and straightforward as the drink itself.



Based in four offices around the UK and Barcelona, our team combines years of investment expertise with our incredible industry connections to ensure we deliver reliable advice and consistent returns for our clients.

We're proud of the support we've been able to offer to our clients and our partner distilleries. As spirit enthusiasts ourselves, we're delighted to be offering our clients new opportunities, helping diversify their portfolios.



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“

From start to finish the service was impeccable. I have been thinking of getting into this field and they helped me through the process with ease.”



**feefo** 

**2022 REVIEW**

**4.8 SERVICE RATING**

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# The world *wants whisky*

## **SCOTCH WHISKY, TO BE PRECISE.**

It's an asset with a highly desirable global demand, but with a very limited supply. This is due to the time it takes for New Make Spirit to become legally classified as Scotch Whisky. As the spirit's flavour and character develops over time, so does its value. Making casks a superb choice for those looking for a tangible alternative investment.

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Any whisky still in its cask after 20 years is extremely rare and valuable



# 377,000KMS

Laid end to end, those bottles would stretch 98% of the distance to the moon



Scotch Whisky exports are worth

# £4.5BN



More than 11,000 people are directly employed in the Scotch Whisky industry in Scotland and over 42,000 jobs across the UK are supported by the industry

# 22M

casks lie maturing in warehouses in Scotland waiting to be discovered - that is around 12bn 70cl bottles



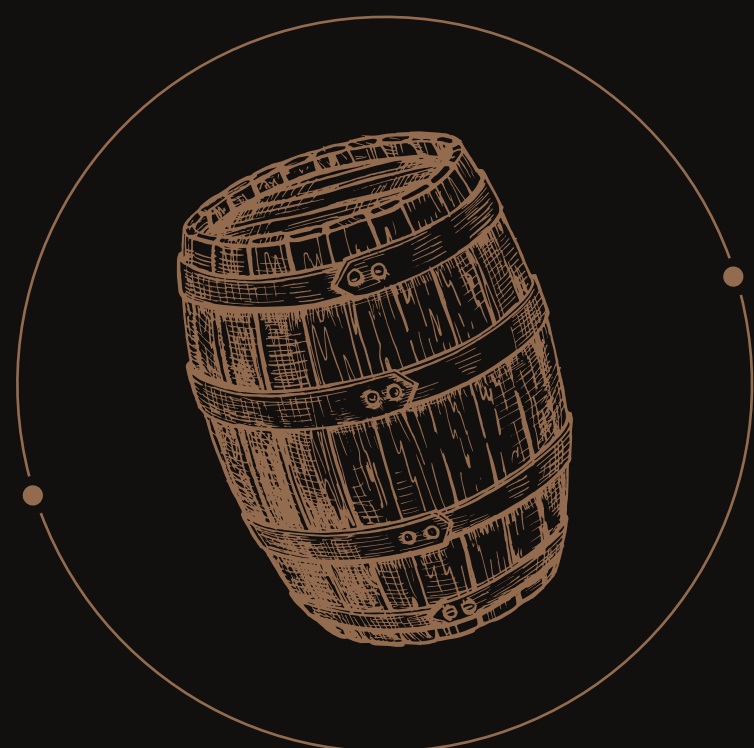
THERE ARE

# 141

operating Scotch Whisky distilleries across Scotland

(70cl @40% ABV) of Scotch Whisky are shipped from Scotland to around 180 markets around the world each second, totalling over 1.3bn A year

# 44 BOTTLES



# 2.2M

Visitors to Scotch Whisky distilleries



# 5.5BN

The Scotch Whisky industry provides £5.5bn in gross value added (GVA) to the UK economy



# 75%

Scotch Whisky accounts for 75% of Scottish food and drink exports, 22% of all UK food and drink exports, and 1.4% of all UK goods exports

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# How it *works*

Our cask specialists are here for you every step of the way. Your Portfolio Manager will work with you to establish your goals and targets from the outset. Tailoring your personal journey whilst also being mindful of your budget and risk appetite.

Once matched with the best casks possible, your Portfolio Manager will remain by your side, using in-depth market knowledge with real-time data to ensure you make informed decisions with your whisky.

When the time eventually comes to exit your investment, our team will leverage our strong industry connections to ensure your goals are realised and exceeded wherever possible.





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# Our *process*



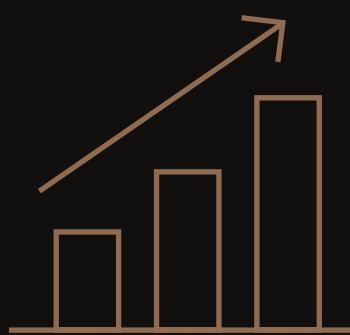
**FIRST CONTACT**



**ADVICE ON  
HOW TO SELL**



**BESPOKE  
PROPOSAL**



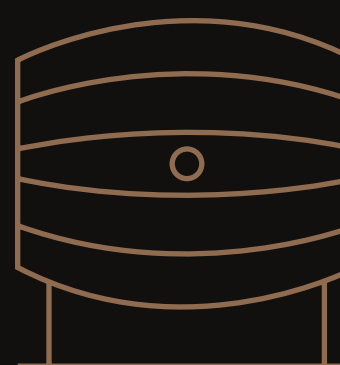
**PORTFOLIO  
MANAGEMENT**



**ONLINE  
PORTFOLIO**



**CERTIFICATE  
OF OWNERSHIP**



**CASK SECURED**

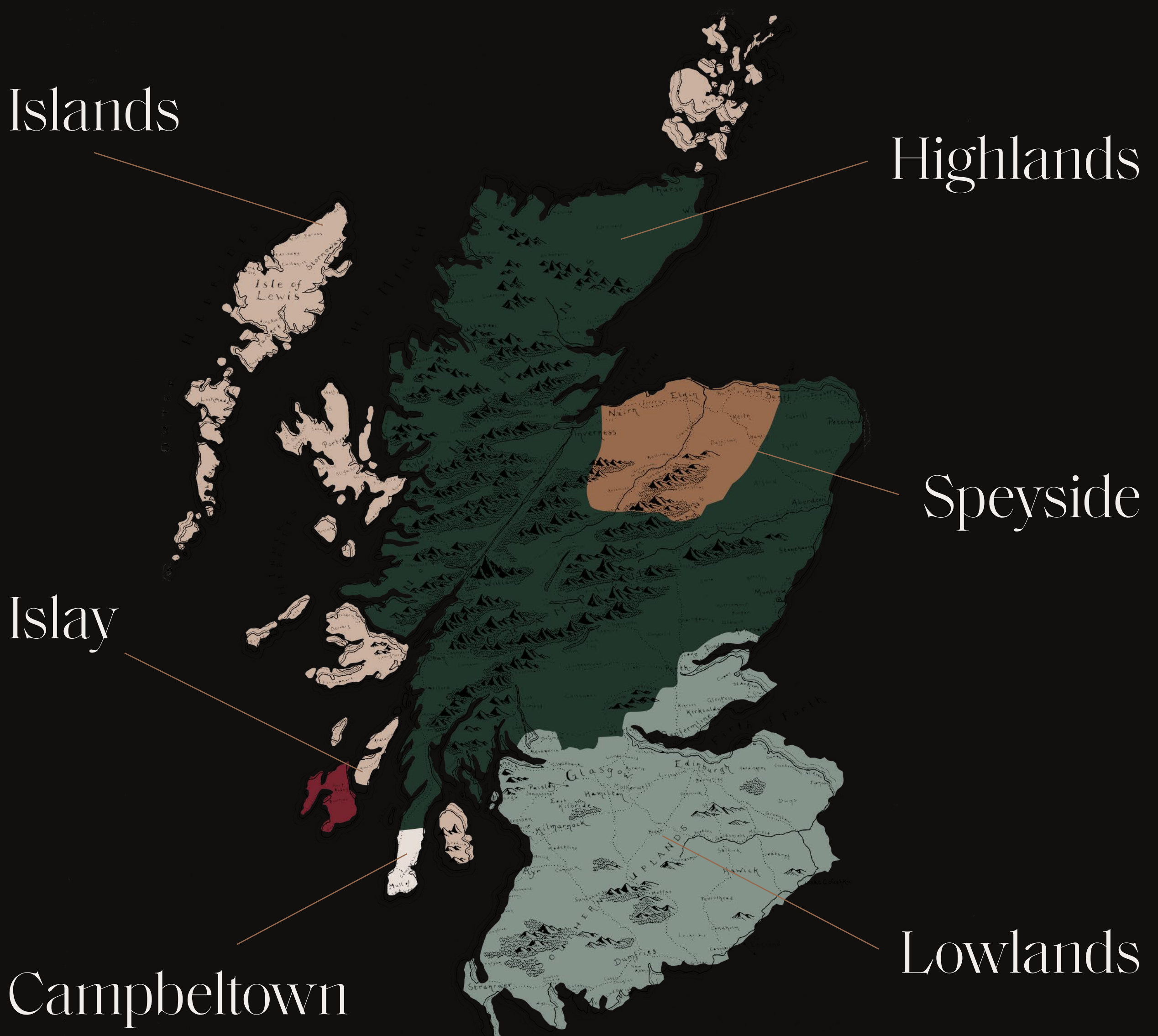


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# Whisky *heritage*

Scotland is home to 141\* distilleries, the oldest of which, The Glenturret, has been active since 1763.

The distilleries are categorised into six regions, each region known for its distinctive features and flavours.



\*Figures correct at the time of publishing.



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# Supporting *independents*

With over 36% of all distilleries owned by Diageo, Pernod Ricard and Bacardi, it can be challenging for upcoming distilleries to raise the capital needed to expand. The most famous whisky brands are all multi million pound corporations with the resources available to survive whilst their spirit matures.

Thankfully, Whisky Partners offers independent distilleries the opportunity to sell casks easily and quickly, providing much-needed cash flow without sacrificing control.

65.2% of all Scotch Whisky distilleries are owned by big businesses with control of more than one distillery.

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# The casks *influence*

As New Make Spirit legally has to mature for a period of no less than three years in Oak Casks before becoming Scotch Whisky, its flavour and colour change as the spirit interacts with the wood around it.

The type, size and age of the casks used heavily influences the final flavour profile and value of the Whisky.

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## **BARREL**

200 Litre



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## **BARRIQUE**

225 Litre



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## **HOGSHEAD**

250 Litre



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## **BUTT**

500 Litre





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# Exit *strategies*

## **PRIVATE INVESTORS**

Like yourself, there are other investors in the marketplace looking for high-quality, aged Whisky Casks. We can assist you in finding the right buyer.

## **GIFT IT**

An incredibly unique and thoughtful purchase, you can gift your Whisky in either bottle or cask form.

## **PRIVATE BOTTLING**

This is your Whisky, enjoy it! We can use our industry contacts to help put you in touch with reputable bottling firms. Should you wish to bottle your casks to be sold or drunk.

## **AUCTIONS**

Selling aged Casks at auction requires the least amount of effort. Our experts will help advise you if an auction is the best option for you.

## **WHISKY BRANDS**

Independent bottlers and brands alike are always looking for great quality aged casks, allowing them to bottle or blend the Whisky for their own stock.



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# Success stories

After reading about cask investment in a newspaper in 1995, a former Pilot started his own journey by purchasing four casks for £6540. Upon sale in 2021, his investment had gained him an incredible £300,000. Now retired, the windfall was used to purchase a holiday home in Spain.

Former bank manager Roger Parfitt purchased two casks in 1996 for £4700. A self-confessed Whisky novice, Roger wanted to diversify his portfolio with asset-backed investments. Sold to Whisky Partners in 2021, Rogers' two casks returned an incredible 4600% with the £225,000 used to help not only pay off his mortgage early but invest in two more casks for his children.

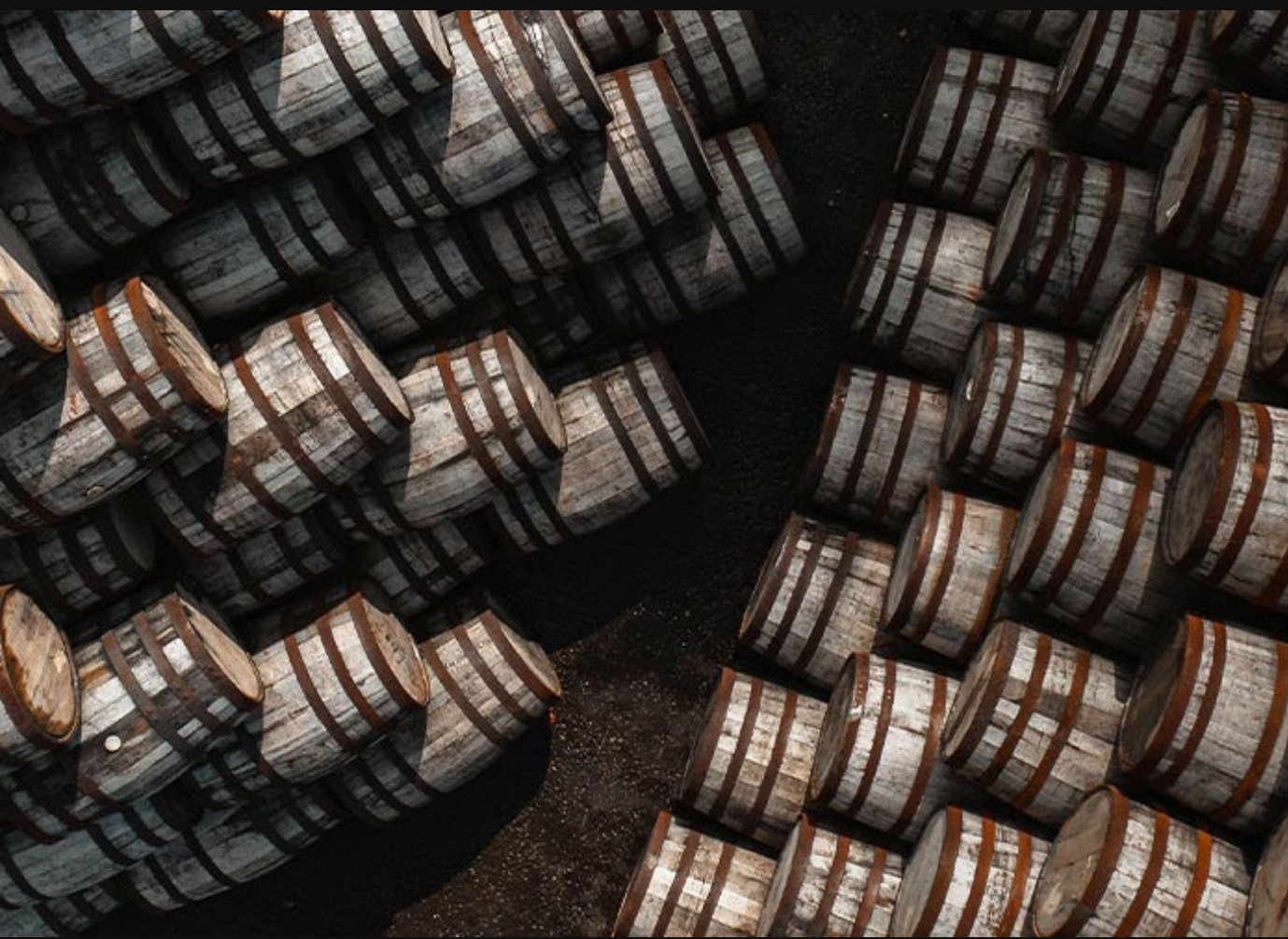
An expert in his field, Financial Advisor Mr Wallington knows how to manage money. Now retired, he has turned his attention to his grandchildren's finances. After setting up ISAs, he has now turned to alternative investments for protection against inflation. Purchasing three casks each exempt from Capital Gains Tax, he hopes the windfall will help his grandchildren with their tuition fees.



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# Security

When investing, you want complete control, security and transparency. We understand that, and we've built our business around these core principles. Issued a WOWGR licence in March 2020, our company is fully licenced and audited by HMRC for the purchasing, selling, and handling duty suspended alcohol.



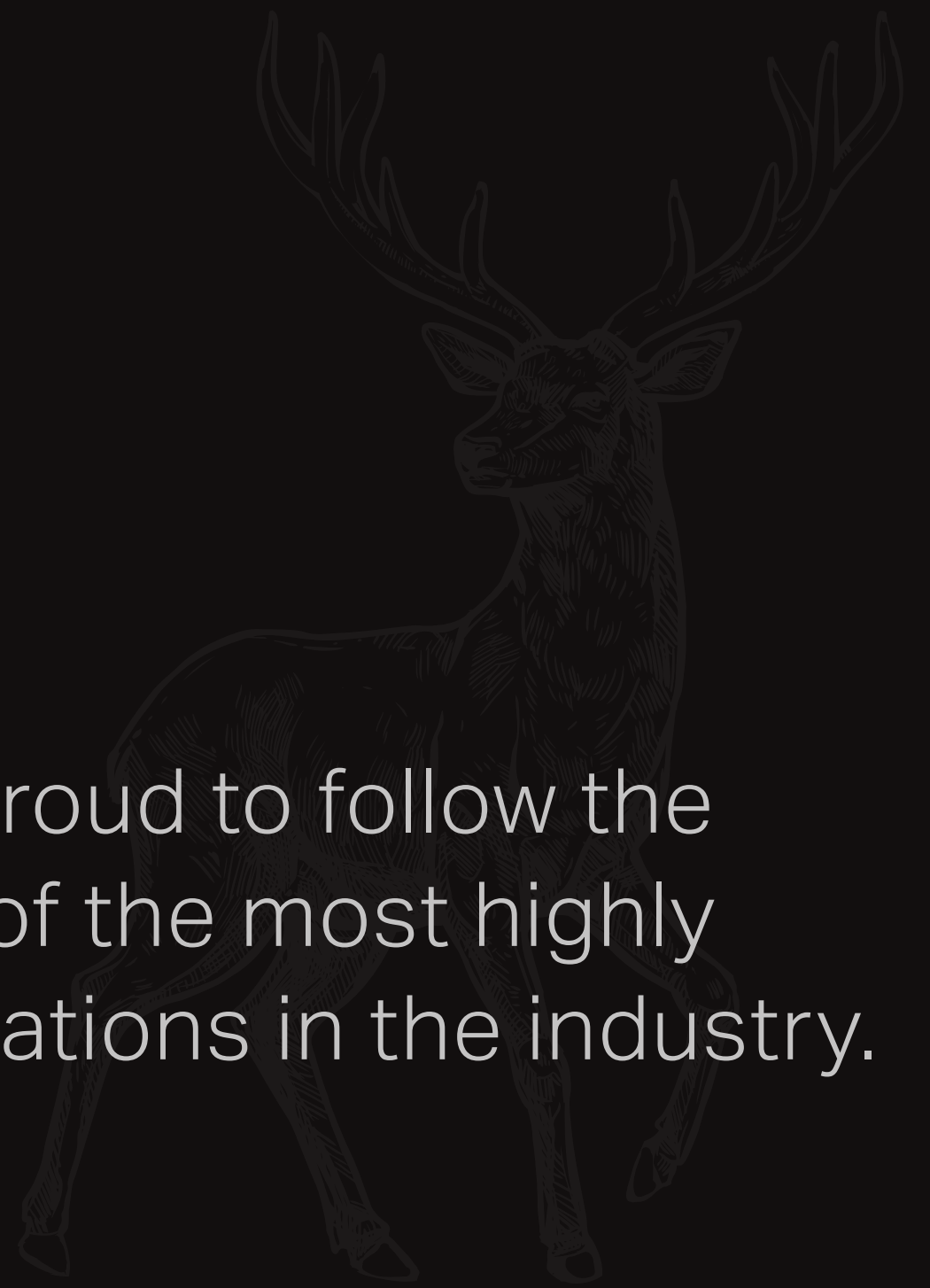
We've designed and built our bespoke system and associated apps to ensure maximum security for all our clients. Stored in our bonded warehouses, Whisky Partners only sells casks we physically own. This means our clients not only benefit from our bulk purchase pricing, but they are investing in casks we believe in.

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Whisky Partners are proud to follow the rules and regulations of the most highly regarded trade associations in the industry. These include:



- Scotch Whisky Association (SWA)
- British Distillers Alliance (BDA)
- The Malt Distillers Association of Scotland (MDA)
- Wines and Spirits Trade Association (WSTA)





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# Final *words*

Thank you for taking the time to read through this brochure. We hope you've found it helpful and that it's answered some of the questions you may have had about the incredible opportunity Whisky offers.

Not long ago, whisky casks were reserved for the select few, those in the know. That's all changing now, and we are so proud of the work our incredible team has done to bring Whisky into the 21st century.

From securing our first ever cask to developing our bespoke portal and apps, we've strived to make investing in Whisky easier for all. So whether you're looking purely at Whisky's financial benefits or wanting to fulfil a passion project, we're here for you every step of the way. - Whisky Partners

— *Whisky Partners*



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# FAQs

## WHY BUY WHISKY?

Until recently, cask whisky was difficult to purchase. So, unlike equities and bonds, it's not a 'crowded trade'. Buying tangible assets gives you more financial security as products can't go bust as organisations can. It makes buying a cask of whisky a much more attractive option

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## WHAT IS A CASK?

A cask is the wooden container that whisky is stored in while it matures and it plays a critical role in developing flavours. Casks can come in all different sizes and wood types, but the most common type used for whisky is a 200l barrel that was originally used to mature American Bourbon. However, whisky is regularly matured in other types of casks including sherry, wine and tequila, all of which bring their own flavours to the spirit.

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## WHAT IS FIRST FILL AND REFILL?

Casks can be described as 'first fill' or 'refill'. A cask that is being used to mature Scotch for the first time is referred to as 'first fill'. It becomes a 'refill' cask when used for a second or subsequent time



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# Glossary

## **ALCOHOL BY LITRE (ABL)**

The quantity in which whisky is measured, by the litre.

## **LITRES OF PURE ALCOHOL (LPA)**

The measure of the alcoholic content of a spirit. e.g. a 250-litre cask of whisky at a strength of 60% contains 150 LPA.

## **THE ANGELS' SHARE**

The alcohol that evaporates whilst the whisky is maturing in the cask.

## **BONDED WAREHOUSE**

A secure storage facility audited by HMRC where whisky is held while maturing.

## **DUTY**

A tax paid when taking a cask out of a bonded warehouse for bottling and selling into the retail market.

## **CASK**

A cask is the wooden barrel that whisky is stored in to mature.

## **EX-BOURBON CASK**

A cask previously filled with bourbon.

## **RE-CHARRED CASK**

A cask that has been flame-burnt to add another flavour profile to the spirit.

## **REGAUGE**

The drawing of a sample from a cask to test the alcohol strength and volume.

## **NEW MAKE SPIRIT**

The clear, potent spirit before it's been cask matured for at least three years.

## **MALT WHISKY**

A whisky produced solely from malted barley, yeast and water – and yes, malt whisky is essentially distilled beer.

## **SINGLE MALT**

A whisky produced in a single distillery

## **BLENDED MALTS**

Whisky containing the product of more than one distillery

## **SLEEPER DISTILLERY**

A distillery that has stopped production but still holds casks in its inventory.

## **WHISKY OR WHISKEY?**

Whisky comes from Scotland whereas whiskey comes from Ireland.



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