



THE
INVESTMENT
PLATFORM
THE SIMPLEST WAY TO INVEST



This document is intended for investment professionals only.

WELCOME TO THE INVESTMENT PLATFORM

Progressive advisers are at the forefront of profound change within the industry. Professionalism, competitiveness, transparency and value for money are now a necessity in running a successful and sustainable advisory business.

The same also applies to platforms – we can only be successful if we can continually demonstrate our value to the advisory market providing an excellent product that is cost effective, easy to use at a competitive price. The smoke and mirrors that have historically been present in industry structures are moribund and the future will be won by those with the best propositions.

We decided to establish The Investment Platform in response to continued demand for an alternative platform, one that could offer easy access to a large universe of funds, structured products, direct equities and ETFs. Also, there is an increasing demand for a high quality a Discretionary Fund management Service (DFM). One that really understood the needs of both the international adviser and investor and we are pleased to be able to come to market with exactly that. This guide is intended to explain more about the platform and how we believe it can help you expand your business.

What we offer

- We have delivered full transparency to clients, where the charges are clearly and concisely explained and where The Investment Platform receives absolutely NO rebates from investment managers
- We've worked with our partners at Mauritius Commercial Bank (MCB) to be able to access a wide range of institutional share classes.
- We provide a personalised charging summary for every client.

- The Athena Discretionary Fund Management Service is available if required. It allows a UK Authorised and domiciled fund manager to manage your clients portfolios directly on the platform
- We have an experienced team that have spent years working in the support and marketing operations of investment companies and you can be confident that we can support you and your clients.

Sustainable Support

The Investment Platform was launched after significant analysis of what both advisors and clients wanted and after over a year of planning with our key strategic partners. Sustainability and support are essential when looking for a platform upon which to build an investor's future. We are committed to providing this support and developing the platform as investor demands increase.

We hope that this guide will give you a more detailed idea of what The Investment Platform can provide.



WHAT IS THE INVESTMENT PLATFORM?

We believe our Investment platform offers the most comprehensive, flexible and cohesive adviser platform in the international advisory market place. We have the ability to accept lower contributions, meaning that many investors can now access a fund platform at a competitive price.

Here's an overview of some of the services and support that we can offer you:

Range of Funds/Tax Wrappers	Range of Funds/Tax Wrappers	Support Services
Personal Portfolio (Funds)	Available 24/7	Online support via dedicated website
Stocks and Shares Portfolio	Available 24/7	International Sales managers
Over 2,000 Funds	Integration with a range of back office systems	Telephone based adviser support team
Wide range of investments- OEICS, UCITS, SICAVS, ETFs, Investment trusts, Equities	Online View Access, for your clients if you choose	
Access to the Athena Discretionary Fund Management service		

Utilising The Investment Platform in your business

We will look to support you depending on what your specific needs are at any point in time. We fully understand that these needs may change according to different client requirements. We will work with you to identify how these needs can be addressed by the platform and help to create a bespoke solution for your clients where necessary. Our aim is simple, to help you grow your business so that we can grow ours.



Empowering your investment proposition



Supporting your business



Helping to drive your business forward

DRIVING YOUR INVESTMENT PROPOSITION

The Investment Platform is a conduit to deliver your investment proposition to your clients. The platform has been designed to be as flexible as your requirements need it to be. Each client has different needs and the platform can adapt accordingly.

YOUR OWN INVESTMENT PROPOSITION OR AN OUTSOURCED ONE?

The Investment Platform allows you to either build your own portfolios or to appoint an external fund manager to do so, or a combination of the two. The key to The Investment Platform is having the flexibility to offer whatever combination you believe to be the most suitable.

The Investment Platform helps you to construct a robust investment process individually tailored to investors needs as well as your business requirements

Constructing your own portfolios		Outsourced investment solutions		
Investment Choice	Discretionary Model Portfolios	Single Fund Solutions	Model Portfolios	Discretionary Investment Managers
Thousands of 'clean funds'	Simple model portfolio construction & Editing	Risk Graded Funds	Third party asset allocation	Managed Athena Portfolios
		Multi manager funds	Easy selection and rebalancing	
		Passive funds		
Clean Share classes available (OEICS/ Unit Trusts/SICAVS/UCITS)		ETF's		
Investment Trusts		Equities from most major stock exchanges		
Corporate bonds/Treasuries and Gilts		Structured Products		



Supported by an enormous investment universe

HELPING TO POWER YOUR BUSINESS

We believe that you are likely to be looking at using The Investment Platform if you are interested in :

- **Developing a business with a long term value**
- **Offering a professional and bespoke service to clients**
- **Meeting client service needs**
- **Providing advice and planning rather than products**
- **Building persistency and loyalty**

Our goal is to help you to grow your business in order to grow our business and create embedded value.

We will strive to help you build a business that is:

Profitable	Valuable	Enjoyable
is efficient operationally	has increasing recurring revenues	inclusive for staff
hits profit targets regularly	generates persistent AUM	helps to create 'time'
has a recurring revenue stream	aligns people, process and profitability	generates satisfied clients
keeps costs under control	retains key clients	
	obtains high net worth referrals	



OUR COMMITMENT TO CHARGING STRUCTURES

The Investment Platform has a simple and flexible charging structure that makes it easy for you to manage your clients investments efficiently and effectively.

- **Transparent charging structure**

Our administration and investment charges allow the client to see clearly what they are paying in order to hold their investment on the platform

- **Consistent pricing structure**

The same charging structure is available to all investors

- **No extra charges**

There are no extra charges other than those detailed in the key features.

- **No fund management fees are payable to The Investment Platform**

We believe it is essential that an investor understands what they are being charged and what for. We believe this will lead to long term client satisfaction, excellent retention and increased AUM, beneficial to your business.





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TO FIND OUT MORE:

Visit us on www.theinvestmentplatform.co.uk

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