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Platform One
a premium service for private investors

As Regular As Clockwork

Regular savings schemes without high charges are a gap in the International market and can be a point of difference for advisers.

Platform One offers an innovative solution not generally accessible - a regular savings plan with complete flexibility, no tie-ins and a low cost structure. Life assurance policies have been used to meet client needs, but these have proved expensive and inflexible.

Promoting such a new product is likely to assist advisers to reach a wider client base and develop an on-going and growing revenue stream.



What clients can benefit?

- Members of company group pension schemes
- Individuals making regular contributions to their own pension
- Individuals wishing to make regular savings

The scheme is highly suitable for contracting professionals (e.g. doctors, IT specialists etc) as well as for companies as part of an employee benefits package.

For more information please contact Client Services on +44(0) 345 366 5445

The 'Hallmark' regular savings product benefits from lower costs than our standard accounts.

BENEFITS AND FLEXIBILITY

- **Set-up with just one member**
- **Open-ended; no tie-ins or exit penalties**
- **Simple and flexible collection of contributions**
- **Open-architecture – over 5,000 funds available**
- **Automatic, free of charge dealing service; trades placed on 1st or 15th**
- **Most major currencies available**
- **Company can pay scheme costs for pension schemes**
- **Badged service for advisers**

FEES & CHARGES

- **Annual Portfolio Charge** €78 p.a.
- **Annual Platform Charge** 0.30% p.a.
- **Minimum regular contribution** €50
- **No dealing charges (subject to terms)**
- **No initial charges**
- **All rebates credited to clients account**

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