

## UK SERVICES

As an adviser, it's hard to keep track of what Wraps are available, let alone what they can offer you and your clients. Until now, many advisers have had to compromise by using a 'one size fits all' wrap that leaves clients at either end of the scale wanting.

Clients with substantial holdings effectively cross-subsidise lower value portfolios, whilst receiving the same level of service.

By focusing on the needs of financially substantial individuals, Platform One is able to deliver a superior level of service, support and value, whilst remaining flexible, functional and RDR compliant.

### SERVICE

Most wraps provide a range of tools and services that help IFAs to manage their clients' portfolios. Platform One not only make these available to use, but is willing and able to produce bespoke illustrations, performance reports, valuations and adviser payment statements when you need them. Efficient administration, experienced staff and a passion for excellence is what defines Platform One's exceptional service levels.

### FLEXIBILITY

Of course, access to a comprehensive range of funds and other securities is essential for advisers to manage their clients' wealth independently. Platform One currently offers over 3,000 funds - and it's growing every week. To claim true 'open market' functionality requires more than just investments. With Platform One, you can chose from a wide range of third party providers, offering Pension and Bond wrappers that suit your clients' needs. This means new and existing business can be placed on the Platform One Wrap, without surrendering the policy or causing chargeable events.

### SUPPORT

By focusing solely on clients with substantial wealth, Platform One is able to keep client and adviser numbers down, meaning personal support comes as standard. Our staff are available to provide information and assistance, 7 days a week. We respect the relationship you hold with your clients and will always contact you in the first instance.



### FUNCTIONALITY

An online service that enables advisers and their clients to trade has become commonplace in the Wrap market. Platform One also provides current and historic valuations, X-Ray functionality, online tax certificates, the movement of funds wrapper to wrapper, back office integration, non-custody asset valuations and online contract notes, all without having to pick up the phone.

### TRANSPARENCY

Choosing a Wrap Platform for your top tier clients requires careful consideration. Platform One operates a fee based charging structure, with adviser fees being paid to you directly from the portfolio. As a result of RDR we no longer offer Rebates from funds but instead offer clean share classes where discounted Annual Management Charges are offered, a benefit that is lost if assets are held directly with fund managers.

### VALUE

When choosing the right Wrap for each client, price isn't everything. However, it helps that at 0.30% p.a. below £1m and significantly discounted rates on balances in excess of £1m; Platform One offers excellent value for money. Many Wraps charge a percentage based dealing charge. This is great for low value trades, but becomes very expensive when managing high value portfolios. Platform One has a fixed dealing charge, regardless of the purchase amount. Add to this our Portfolio Modelling functionality and our Family Group Discounts, and it's easy to see how Platform One can save you time and your clients money.

*“It's time for change. High value clients and their advisers deserve a service that is tailored to their needs, rather than satisfying the majority.”*

Michael Fordham  
Managing Director

Platform One also offers an International and Global Service based in Luxembourg, allowing UK and expatriate clients access to the benefits of Wrap, regardless of their tax status.

For more information about Platform One's UK or International and Global services, please visit our website at [www.platform1online.com](http://www.platform1online.com) or contact us on 0345 366 5445.