



THE
INVESTMENT
PLATFORM

HELPING YOU ON YOUR INVESTMENT JOURNEY



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Investment Platforms have been at the forefront of profound change within the investment industry where investors have demanded more flexible, transparent and competitive solutions to their investment requirements.

The Investment Platform (TiP) has been very much part of this change and we can only be successful if we can continually demonstrate our value to investors, providing an excellent product that is cost effective, easy to use at a competitive price. TiP is committed to continuing to be at the forefront of this evolution.

The Investment Platform was established in response to continued demand for an alternative platform, one that could offer easy access to a large universe of funds, structured products, ETF's, and direct equities. The Investment Platform is able to offer access to all of the above and this guide is intended to explain more about the Platform and how we believe it can help you to expand your investment horizons.



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 custodian partners to be able to access a wide range of institutional share classes.
- We provide a personalised charging summary for every client.
- 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.

SUSTAINABLE SUPPORT

The Investment Platform was launched after significant analysis of what clients wanted and after significant 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 investment 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 & Shares Portfolio	Available 24/7	Telephone based support team
Wide range of investments UCITS, ETF's, Structured Products, Medium Term Notes & equities	Online view access	International Sales Manager

DRIVING YOUR INVESTMENT PROPOSITION

The Investment Platform is a conduit to deliver your investment performance. 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.

The Investment Platform helps you to construct a robust investment process individually tailored to your specific needs



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.

CONSTRUCTING YOUR OWN PORTFOLIO		OUTSOURCED INVESTMENT SOLUTIONS		
Investment Choice	Discretionary Model Portfolio	Single Fund Solutions	Model Portfolios	Discretionary Fund Managers
Thousands of funds	Simple model portfolio construction & editing	Risk Graded Funds	3rd Party Asset Allocation	Managed Athena Portfolios
Clean share classes available UCITS, Unit Trusts, OEICS.		Multi Manager Fund Options	Easy selection & rebalancing	
Investment Trusts		Passive Funds		
Corporate bonds/Treasuries and Gilts		ETF's		
		Equities from most major stock exchanges		
		Structured Products		

HELPING TO POWER YOUR INVESTMENT

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

- Developing an investment portfolio with a long-term value
- Investing in a wide range of investment products
- Viewing your portfolio online

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

We will strive to help you build an investment portfolio that is:

Profitable	Valuable
is efficient operationally	offers every possibility to grow your portfolio
hits profit targets regularly	Helps to create time via easy trading
keeps costs under control	Allows you to view your portfolio wherever you are

Supported by an enormous
investment universe

OUR COMMITMENT TO CHARGING STRUCTURES

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

Transparent charging structure

Our administration and investment charges allow you to see clearly what you are paying in order to hold your 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 investment.

TO FIND OUT MORE:

Visit us on www.theinvestmentplatform.co.uk

Email us at info@theinvestmentplatform.co.uk

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