

A platform built around you and your business

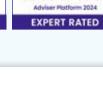
experience for their clients - is at the heart of what we stand for. We believe in building strong, enduring partnerships with adviser firms, collaborating closely with them to ensure our platform remains in-tune with their requirements. Our goal is to help firms build strong, profitable and sustainable businesses and to support them through any challenges that may arise.

Making advisers' lives easier and their firms more efficient – while providing a great end-investor



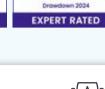














developments planned.



"The many ways in which Fidelity has supported the launch and first 10 months

Platform user

Exceptional choice and value

Investment Account. Cash Management Account.

■ Low-cost, award-winning Pension.

■ Trusts and Offshore Bonds.

■ ISA and Junior ISA.

- A highly-competitive and transparent charging model
- Clean share price funds only.

(both third-party and in-house).

Capital Gains reporting.

and the PROD rules.

Income reporting.

No set up or administration fees for our Pension. No additional costs for drawdown. No charges for our cash management services.

■ A flat annual Investor Fee of £45. ■ A Service Fee of 0.25% pa based on the value of the client's investments.

Business services that put you in control

Research tools, Morningstar ratings and fund fact sheets. Secure Client Management facility.

• Over 30 reports available providing comprehensive client and business MI.

- Support for your business and clients
- pensions, retirement and tax.
- Advice on combating the increasing threat of cyber crime.
- Fidelity Conquest Planning We've partnered with Conquest as the distributor of its financial planning software to UK IFAs.

All the information for a client review meeting in one convenient place.

and decumulation phases of a client's lifetime.

The software supports advisory firms with goals based financial planning, including accumulation

A detailed overview of client pension accounts with over 50 data fields, including contributions,

Submit documents that are digitally signed by clients using, for example, DocuSign or Adobe Sign.

Digitally submit over 70 offline instructions or documents to us in a secure and timely way.

Sustainable investing hub Insights, guides and fund information to aid your client discussions.

Digital signatures

Client reporting

■ Pension Summary report

Upload & Send function

withdrawals and allowances.

We've joined the Origo Integration Hub to allow us to work with different back-office providers to help cut the time you spend on admin. ■ Enhancements to our DFM service

updates. We've also introduced new processes to facilitate the bulk re-registration of client assets.

■ Enhanced drawdown service

years in a row - 2020, 2021, 2022 and 2023

"The ease of doing business is playing an increasingly important role in an adviser's platform

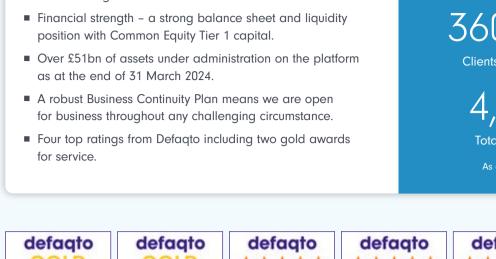
■ Ensuring social mobility is no barrier to success. These priorities are sponsored and led by business leads and those passionate about the cause and impact to our future.

Respecting and increasing our cultural diversity.

NextWealth









Easy to do business with ■ Efficient administration and enhanced investment services. Provides a single view of the client.

A fully-automated re-registration and transfer process

utilising TEX and Origo's 'Options transfer' service.

■ Increasing client satisfaction – in 2022 and 2023, our

relationship Net Promoter Score was the highest on

record since the survey began over 10 years ago.

Flexible Adviser Fee service catering for initial,

99% of transactions are conducted online.

ongoing and one-off fees.

325 +

Technical Matters hub: approximately 100 different resources to help you with the more complex areas of

 Ongoing practitioner insights and research on managing an advice business, such as our IFA DNA study and The Financial Power of Women report.

Regulatory updates and summaries, looking at areas such as pension transfer advice, vulnerable customers

Core features

■ API Technology deliveries It is now possible to create and control personalised screens, giving you greater control over the

Fully automated drawdown capability supporting one-off and regular crystallisations and taxable income. Re-registration

The ability to track re-registration applications online and receive email notifications for status

We've added functionality such as enriched reporting and the ability to split fees.

submission protocols."

due diligence. This is why we have undertaken detailed research of platforms' document

Achieving a greater gender balance and parity. ■ Embracing our LGBT+ people and communities.

low-carbon economy.

We joined Climate Action 100+ in 2017, are a supporter of the Taskforce on Climate-Related

investment choice, cost effective and flexibility with pensions and products overall." Platform user

"Excellent service and staff, good on-line portal for adviser and clients, excellent

STAR PA 2023

WINNER







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As a privately-owned and independent company, we are able to make long-term decisions in the best interests of our clients.

A service you can rely on

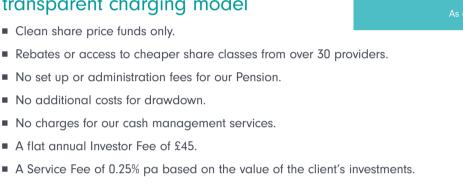
Multi-million-pound investment programme over the last nine years with ongoing

2023 sales Fidelity Adviser Solutions wrote over £5bn in new sales for the fourth year in a row. Source: Fidelity

> of our distribution relationship has been exemplary."







■ Bespoke and firm level advisory model portfolio service – we also offer a DFM Service that has 140+ DFMs

Your clients have access to our user-friendly mobile app - one of the highest-rated apps in the sector. Dedicated web hubs on the Consumer Duty and the fair treatment of vulnerable clients.

customer experience. Origo Integration Hub

- We have been awarded this accolade for four
- Embracing diversity and inclusion As an employer, we are committed to diversity and inclusion and we continue to build a culture where

everyone's voice is heard. As such, we have set five priority strands for our global D&I activities:

As a company, Fidelity International strives to partner with others in the industry to generate sustainable outcomes. This includes engaging with companies on climate change and supporting the transition to a

We are signatories of the Principles for Responsible Investment and currently have an A+ rating.

Ensuring accessibility and enablement for people with disabilities and health conditions.

- A commitment to sustainability
- Financial Disclosure (TCFD), a member of the Carbon Disclosure Project and a partner of the Climate Bond Initiative.
 - Further third-party recognition

Adviser Solutions