Why advisers choose Wealthtime

We have over 15 years' experience in the platform market as an award-winning and innovative provider. Our mission is simple - to help advisers grow their business and deliver the best possible outcomes for investors.

Here's why advisers are choosing Wealthtime today:

We're an established platform provider

15 years' experience in the platform market

77k investors using our platform

1,500 adviser firms using our platform

B strong AKG financial strength rating

3,800 adviser plaftorm users

12bn AUA

With an award-winning proposition

- Annual upgrades and continuous improvements
- Best Retirement Proposition – UK Platform Awards 2024
- Outstanding range of wrappers, investments and tools
- Sustainable approach to price with competitive charging structure

And we never stop improving our platform

As well improving our platform for today, we're also investing for tomorrow.

Over the past year, we've deployed a range of significant updates to the platform, improving the day-to-day experience for advisers.

But we're also building for tomorrow's world. Our new 10-year partnership with Wipro and GBST will future-proof our platform and fundamentally transform our platform and service.

Discover what's coming at [wealthtime.com/advisers/evolution.](wealthtime.com/advisers/evolution)

wealthtime

Wealthtime platform on a page

Flexible range of wrappers

- Stocks and Shares ISA
- Junior Stocks and Shares ISA
- SIPP and Junior SIPP available, supported by an award-winning retirement proposition
- Drip-feed drawdown with online withdrawals
- GIA with unlimited contributions + trust/corporate and third-party options
- Same-day withdrawals for ISA and GIA accounts
- Offshore Bond provided by RL360, who have an AKG rating of B (Strong) and 5* service

Extensive investment range

- Over 6,000 lines of assets
- 3,500 funds from more than 300 fund managers
- Structured products from dozens of providers
- Equities traded on the FTSE All-Share, AIM listed stocks, Gilts and corporate bonds, and investment trusts
- More than 400 ETFs, including aggregated trading on providers like DB x-Trackers, UBS, Lyxor and State Street
- Smoothed Funds (With Profit)
- Secure Lifetime Income (Guaranteed Income)

Comprehensive range of tools

- Construct and amend unlimited model portfolios online – then use them instantly
- Clients can log in anytime, anywhere, to review their investments in real time
- Extensive range of 45 user-friendly reports
- Market-leading CGT calculator
- Detailed portfolio analysis tools
- Insightful fund research tools
- Performance and risk charting

Service that truly supports

- Smart tech, real people - Use our smart tech to self-serve or speak to our dedicated inhouse team for one-to-one support
- Experts on hand - Our service teams undergo extensive training including a six-week intensive course and a long-term 12-month programme
- We value your business - You'll have your own dedicated, named points of contact here to help whenever you need it
- GBC accredited - We're accredited by the Good Business Charter (GBC) - the UK's benchmark for responsible business

Intuitive platform experience

- Smooth client onboarding - Add an investor and open a wrapper in minutes
- Easily open new wrappers - Open multiple wrappers at the same time, saving valuable time and effort
- Continuous improvements and upgrades – based on adviser feedback and regular market reviews
- Building for tomorrow – unique 10-year partnership with Wipro and GBST

Operating in your ecosystem

- Seamless integration - Adviser charging, valuation and transaction data can all be integrated through a direct feed.
- Wide range of back-office systems supported
- Better data, less manual inputs - We've teamed up with FINIO to automatically send daily valuation data from our platform to back-office systems
- Your clients, your brand – Use your brand on client view screens, reports, and outputs from tools

Start working with a next generation platform today

If you're interested in working with us, we'd love to chat. Get in touch with your Wealthtime sales contact or www.wealthtime.com/advisers/contact

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