

# Quilter



## Introducing you to Quilter

*Your award winning online  
investment platform*





# Tailored and trusted financial solutions

*Since 1979, we've been helping customers like you achieve their financial goals and live more prosperous lives.*

That's why over 490,000 people have chosen to invest more than £82.5bn\* with us and why we've consistently won awards for our gold star service.

**We pride ourselves on giving you:**

A safe and secure home for your wealth



The best value for your investments



Quicker and easier access to your money



## *Quilter and your financial adviser*

At Quilter, we believe in the power of professional advice. That's why we work with financial advisers like yours, so that you can enjoy the benefits of a tailored service powered by our market-leading platform.

\* platform assets under management as at 30 September 2024

## Our awards for our gold star platform





## Giving you a safe and secure home for your wealth

*At Quilter, our number one priority is the security of your investments.*

- ✓ As one of the UK's leading investment providers, we continually make **significant investments in the security of our platform**, so you can have peace of mind that your money is in safe hands.
- ✓ Our online Customer Centre is a **safe home for all your documents**, so you can store them securely and access them anytime, anywhere.
- ✓ We provide valuable guidance on how to protect your money and **stay safe online**, so that you can invest confidently.





## Giving you the best value for your investments

*At Quilter, we make sure your financial adviser has access to everything they need so that you can enjoy great value on your investments.*

- ✓ We offer a **suite of tax efficient products, and access to cash savings accounts**, so that your financial adviser can choose a strategy that will help you meet your financial goals.
- ✓ We have negotiated **preferential rates** with many fund managers. This means that we offer the best available price in the market for the most popular (or majority of) funds available.
- ✓ We are pleased to provide you and members of your family with our **best-in-class family discount**, so that you can enjoy better value together.



# Extra value for you and your family

*Did you know you can drive down the cost of investing with our multi-family member discount? With Family Linking we add together all family investments, and cash savings, to calculate the platform charge for all family members.*

## How Family Linking works

- ▶ Up to four generations can be linked.
- ▶ You need to be with the same financial adviser firm.
- ▶ You could all benefit from a reduced platform charge.

Find out how much you and your family could save by speaking to your financial adviser about Family Linking.





## Giving you quick and easy access to your money

*At Quilter, we'll give you access to our market-leading platform so that you have:*

- ✓ everything you need to **see how your investments are performing**, at your fingertips
- ✓ freedom to choose when to receive your money from the 1st to the 28th of each month, so that you can benefit from an **income schedule that works around you**
- ✓ the power to **request withdrawals online and manage your cash** so that you and your financial adviser can enjoy being free from paperwork and complete your transactions faster.



## Welcome to your customer centre

When you become a new Quilter customer, the first thing you'll want to do is activate your online account. Our online Customer Centre and Quilter mobile app are now used by over 260,000 customers, who love the fact that they can:

- ▶ see how their money is performing
- ▶ view all their cash savings and investments in one place
- ▶ go paperless to reduce unnecessary admin.

**Activate your account**  
[quilter.com/login](https://quilter.com/login)

*Having online access has helped me stay organised and it's been great to reduce the amount of paperwork I receive. Activating was easy, and using my account is just like using online banking.*

Janet, 75, Quilter Customer, Salisbury

Your investment may fall or rise in value  
and you may not get back what you put in.

*quilter.com*

*Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years.*

*Quilter is the trading name of Quilter Investment Platform Limited which provides an Individual Savings Account (ISA), Junior ISA (JISA) and Collective Investment Account (CIA) and Quilter Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).*

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