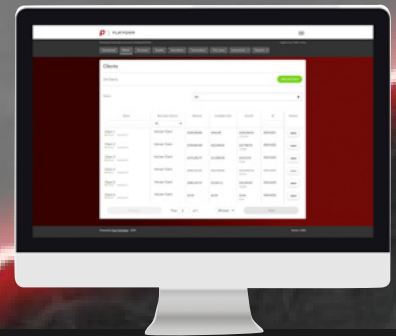


The P1 Platform:

helping you meet your Consumer Duty requirements

The P1 Platform is ideally positioned to support adviser firms in meeting all four Consumer Duty Outcomes.



1 PRODUCTS & SERVICES OUTCOME

Delivering good outcomes

- The Platform is aimed at UK-based clients investing for the medium to long term
- It is designed for clients investing into regulated investment products and services, and shares listed on recognised stock exchanges
- It has a range of tax wrappers, including GIA (General Investment Account), ISA, JISA, Pension and Third-Party Accounts (such as full SIPP, SSAS, and Investment Bonds)
- The P1 Platform can easily cope with a range of business models and services, including advised, discretionary and execution-only portfolios
- It is highly efficient and thoughtfully constructed with future-proofed technology
- Delivering good outcomes requires efficient processes. The Platform is easy to navigate, paperless, intuitive, and fast. This leads to a better user experience for advisers and their clients.

2 PRICE & VALUE OUTCOME

Demonstrating fair value, including between groups

- The P1 Platform is one of the lowest cost investment platforms in the UK but does not compromise on functionality and service levels
- It is low cost across every client scenario; therefore, the platform is appropriate for a wide variety of clients. This means you can be confident recommending the P1 Platform, safe in the knowledge that you can demonstrate the price-value equation to your clients
- We continually monitor value for clients and make improvements where necessary, facilitating the delivery of good outcomes for your clients and avoiding causing foreseeable harm
- The goal of the P1 Platform is simple - to add as much value to consumers as possible at a low price point.

ASSETS	FEE (Per Platform Account)
< £1m	0.15%
£1m +	0.00% (effectively capping the % asset-based fee at £1,500 pa per client)

Subject to a minimum charge of £5 per month per client account

3 CONSUMER UNDERSTANDING OUTCOME

Helping customers pursue their objectives and avoid foreseeable harm

- The P1 Platform strips out jargon, simplifying life for you and your clients
- Our documentation is carefully written to meet Plain English standards
- We ensure that we only provide relevant and clear client reporting and an intuitive user interface
- Our charging structure is simple and easy to understand.

4 CONSUMER SUPPORT OUTCOME

Tailored to the needs of customers

- We respond quickly and clearly to advisers
- Fast response times mean you can support your clients quickly and effectively
- Our team provides excellent service levels, superior to many of the more expensive platforms
- Our quick response times mean you can spend more time helping your clients meet their financial objectives, rather than on platform administration.

Time to take control

Book a demo to find out how P1 can help you and your business meet Consumer Duty requirements, with honest, straightforward, practical advice and support every step of the way

Call us on 0333 241 4129 or email info@p1-im.co.uk for further information

