

IS IT FOR YOU?



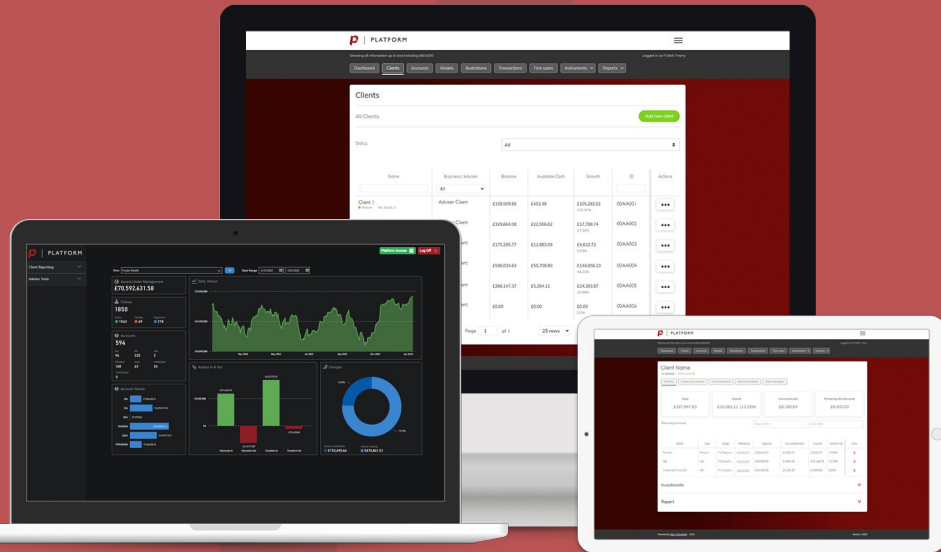
Ready to adopt a highly-efficient, digital-only platform? Don't be burdened by inefficiencies. You need a paperless platform with great service levels, so you can focus on your clients, not admin.



Looking to operate an efficient business and lower costs for your clients? Streamline your processes and experience responsive support, while reducing costs for your clients.



Want flexibility to operate a range of services? Operate advisory models, bespoke portfolios, discretionary models (your own or a third-party) and provide execution-only services.



PLATFORM

As a next-generation investment platform, the P1 Platform helps unburden you from legacy technology and paper-based processes. We believe investment platforms should enable advisers to focus on their clients and enable clients to meet their financial goals, not hold them back with burdensome admin and high charges.

Save your clients money, while you save time.

LOW CHARGES: SAVING YOUR CLIENTS MONEY



Platform - 0.15%

Subject to a minimum charge of £5 per month (£60 per annum)



GIA, ISA, JISA & Third-Party* - £0

*Subject to any applicable Third-Party Product provider charge.



P1 Pension: Accumulation - 0.00%



P1 Pension: Decumulation - £10 + VAT per month

The annual decumulation charge provides access to ALL options we offer.

THE P1 PLATFORM SUPPORTS

ADVISED MODEL & BESPOKE PORTFOLIOS

THIRD-PARTY DFM

P1 MODEL PORTFOLIOS

BESPOKE MODEL PORTFOLIO MANDATES

EXECUTION-ONLY

2,000+ SECURITIES AVAILABLE

THE P1 PLATFORM IS

FULLY PAPERLESS

EFFICIENT

TOPS LANG CAT SERVICE SURVEYS

INTEGRATED

AWARD-WINNING

HEAR FROM OUR USERS



Adam Rowbottom, Moffatts

"The behind-the-scenes support is rarely required but when it is, it is of top quality. All the staff answer the telephone straight away, reply to emails promptly and all know exactly what they are doing. The days of the incumbent providers are numbered if you adopt this system."



Dean Mullaly, Mark Dean Wealth Management

"How refreshing to use an investment platform that's intuitive where to go next and not being faced with 12 stage processes to carry out the simplest of tasks. Speedy, proactive support always on-hand gives us comfort to use the P1 Platform regularly, and at just 0.15%pa charge. It's hard to justify using any other platform if your client is simply going into one of your in-house model portfolios."

REPORTING MADE EASY



Performance reporting with portfolio breakdowns by asset class, sector, geography and top holdings.



Planning tools: CGT report, Remaining ISA Allowances, Adviser Charges, Pension Contributions, Portfolio Drift and many more.



Dashboard so you can see what is happening on the platform across your client base.



20+ customisable reports, created from adviser feedback

EMAIL: PLATFORM@PI-IM.CO.UK

PHONE: 0333 214 4129

WEB: PI-IM.CO.UK

SAVE CLIENTS MONEY

WHILE YOU SAVE TIME



PLATFORM

WHO ARE P1?



Established in 2016



£1.5bn AUI – March 2023



Achieved multiple awards across our service lines



Focused on driving efficiencies and positive change in the industry

HELPING YOU MEET CONSUMER DUTY

DEMONSTRATING FAIR VALUE

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.

TAILORED TO MEET CUSTOMER NEEDS

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.

HELPING CONSUMERS UNDERSTAND THEIR INVESTMENTS

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.