



INVESTMENT SERVICES

P1 Investment Services Limited (P1) is an investment manager and investment platform operator working closely with financial service industry professionals, using technology to overcome the restrictions and limitations dominant in many traditional service providers.

We provide efficient, low-cost and effective solutions, primarily through two service lines; our investment platform (The P1 Platform) and our investment management services (P1 Investment Management) which includes investment portfolios available through the P1 Platform and third-party platforms.

At P1 our key focuses are to provide a high level of client service, develop innovative solutions, and to save time for our users and reduce costs for our clients.

100+

Advisers use P1

£1.5bn

Assets Under Influence

2000+

Clients

P1 KEY PEOPLE



James Priday, CEO

James' background is in running a successful multi-services firm, incorporating wealth management, legal and accounting services. James founded P1 as he felt the high costs and inefficiency of existing platform providers and investment managers needed to be challenged. He holds professional qualifications in both financial planning and investment management.



Hugo Thorman, Chairman

Hugo built and developed the Ascentric/IFDL investment Platform (now the M&G Wealth Platform) building it to £9.8bn of assets. Prior to this Hugo was CEO of James Hay, and a Director at Abbey National. Hugo has a MBA from the London Business School.

P1 DETAILS

- P1 was established in September 2016 by James Priday.
- P1 is authorised and regulated by the Financial Conduct Authority. Registration number 752005.
- P1 has **£1.5 billion Assets Under Influence** as of March 2023 across two service lines.
- P1's investment and platform teams have over 100 years of experience in financial services combined.
- P1 Platform launched in April 2020.
- P1 Platform **assets have grown 218%** in the 24 months up to March 2023, and **client growth of 194%**, highlighting its impact and quick adoption.

P1 OWNERSHIP

P1 is employee owned, meaning the P1 team are fully committed to our clients, partners and the long-term success of the business.



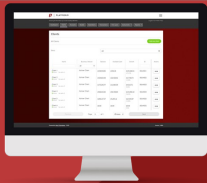


PLATFORM

- Launched in 2020, the phenomenal growth of the P1 Platform highlights the demand for a low-cost, highly efficient investment platform.
- Products available on the P1 Platform: ISAs, Pensions (SIPPs), JISAs, Investment Accounts, Trusts and third-party product accounts.
- 0.15% platform fee, capped at £1m. Showing our dedication to saving you money.
- £0 product fees for ISA, GIA, JISA and SIPP in accumulation.
- P1 Investment Services Ltd are ISA managers.
- Custody of clients assets on the P1 Platform sits with Seccl Custody Limited (wholly owned by Octopus Group—£11bn+ assets under management).
- All accounts are covered by the Financial Services Compensation Scheme.
- The P1 Platform is built on Amazon Web Services and Microsoft Azure Cloud Computing. Both are used by governments & international bodies.

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Paper forms



0.15%

Platform Fee



2500+

Funds and ETIs



P1 Awards

P1 is award-winning across its service lines and recognised by industry press.

We've won awards for the performance of investment portfolios and our platform technology.



P1 PILLARS

Paperless

From launch the P1 Platform has been paperless. Our focus on removing antiquated paper processes and wet signatures from the platform experience is for the benefit of all. Firstly, it removes burdensome tasks like printing, signing and posting forms. Secondly, it's much quicker to open accounts and take action when needed. Thirdly, these efficiencies combine to reduce our costs, which we pass on to you through our low platform charges. Our digital experience gives you access to your information at your fingertips, not once every three months in the post.

Partnership

We know we can't be everything to everyone, so we work with your adviser to integrate with the software and services they use. We see our duty as enabling advisers to focus on advising you, not being an administrative hinderance. Focusing on our core services allows us to keep the cost down and enables us to provide leading service levels.

Price

P1 are aware that price can be one of the biggest external influences on whether you meet your financial goals. Across all of our service lines we work hard to ensure our charges are as low as possible, often the lowest in the industry. We do this by focusing on efficiency, but not sacrificing quality. The P1 Platform is one of the lowest cost platform across most client scenarios.

