

Investment partner

Company profile

Old Mutual Wealth is owned by Old Mutual plc, one of the largest financial services companies in the world. Founded in 1845 and based in London, Old Mutual is a FTSE100 company overseeing £297 billion in customer investments for 16 million customers worldwide (as at 31 March 2014).

Old Mutual Wealth provides you with access to its investment platform. It is an innovative way to manage investments. It provides access to around 1,100 funds together with a range of tax-efficient investment vehicles known as “wrappers” to hold these funds, within a single consolidated portfolio. The Collective Investment Account is one such wrapper, which is available through Old Mutual Wealth’s platform with the AJ Bell Investcentre SIPP. The platform and the AJ Bell Investcentre SIPP are exclusively available through financial advisers.

The provider of the Collective Investment Account is Old Mutual Wealth Limited, a member of the Old Mutual Wealth group of companies. They are authorised and regulated by the Financial Conduct Authority.

Platform excellence

Your financial adviser will take account of your individual circumstances and needs as they evolve over time. The platform enables them to do this by providing access to a wealth of integral portfolio management facilities.

These include an objective, independently verified risk assessment process and resulting asset allocation recommendations that match precisely your individual risk profile. Using the platform also enables your adviser to maintain a clear record of activity on your behalf in accordance with investment regulations.

The platform has been designed with all the features and support services you and your adviser would expect from a successful platform

- integrated independent risk and asset allocation facilities
- a choice of around 1,100 funds from more than 90 fund managers
- straight-through new business processing
- full range of customer-agreed adviser charging options
- extensive range of management information tools and consolidated portfolio valuation capability
- comprehensive online switching capability for financial advisers, free of any administrative charge
- a range of training and support services for financial advisers including face-to-face local support.

Investing in the Collective Investment Account

The Collective Investment Account is a flexible way of investing. In addition to the benefits of investing through the platform, it provides you with the following capabilities

- flexible payment options
- phased investment facility
- regular portfolio rebalancing
- flexible withdrawals to link with providing retirement income strategies through the SIPP
- re-registration of existing investments

Recent awards

MoneyMarketing Financial Service Awards – March 2013
Best WRAP or Platform – Winner

Professional Adviser Awards – February 2013
Best Wrap/Platform – Winner

Financial Adviser Service Awards 2012 – November 2012
Investments Provider – 5 stars
Life and Pensions Provider – 5 stars

The Aberdeen UK Platform Awards – September 2012
Best fund platform – Winner
Leading platform-based planning tool provider – Highly commended

Investment Life & Pensions Moneyfacts Awards 2012
Best Wrap/Platform – Winner
Best Online Service – Highly Commended
Best Equity ISA Provider – Commended

Investment Adviser Platform Awards – September 2012
Platform of the Year – Winner
Best Platform Technical Support – Winner
Best Platform Adviser Service – Winner
Most Diverse Product Range – Winner

Moneywise Pension Awards – September 2012
Best Personal Pension Provider – Winner

FTAdviser.com Online Service Awards – June 2012
Company of the Year – Winner
Life and Pensions Provider – 5 stars
Investments Provider – 5 stars

Charges and investment terms

For details of the Old Mutual Wealth charges, please refer to your financial adviser who will be able to provide you with this information. You can also request a copy of our literature from them, including Old Mutual Wealth's Funds List, the Collective Investment Account Key Features and Terms and Conditions.

Adviser charges may be paid out of your SIPP cash account by AJ Bell Investcentre. In addition, your financial adviser may receive initial and ongoing payments from Old Mutual Wealth. Your adviser will provide you with further details.

AJ Bell Investcentre will not accept investment instructions - these must be arranged directly with Old Mutual Wealth.

Your adviser is responsible for transferring cash between AJ Bell Investcentre and Old Mutual Wealth. Your adviser must transfer cash using AJ Bell Investcentre's online cash movement facility.

Contact details

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