

INVESTMENT PARTNER

Quilter Investment Platform

Company profile

We are part of Quilter plc, a leading UK-focused wealth manager, providing advice-led investment solutions and investment platform services.

Quilter enables financial advisers to deliver the very best service to customers and their families, to help them achieve their financial goals. We offer a comprehensive range of products and investments through our award-winning online investment platform. The Collective Investment Account is one such product, which is available through Quilter'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 Quilter Investment Platform Limited, a member of the Quilter 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.

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:

- a choice of around 2,000 funds from more than 120 fund managers;
- access to the the best available fund prices in the market for the majority of funds;
- flexible withdrawal and income options;
- online investment management processes and tools to help your reach your desired investment goal; and
- Defaqto Gold-rated service whenever you need to contact us.

Investing in the Collective Investment Account

The Collective Investment Account (CIA) is a flexible way of holding a wide variety of assets, with no limits on the amounts you can invest.

Key features and benefits include:

- the ability to open an account with a lump sum of £2,500 or a £99 regular monthly contribution;
- income that can be paid on any day from 1 to 28 of the month;
- the ability to phase your investments into the market from cash;
- e-registration of existing assets; and
- the ability to pay a simple service charge, with no additional charges when investing in OEICs or unit trusts.

Recent awards/ratings

Financial Adviser Service Awards 2020 – November 2020
Investments Provider – 5 stars

Investment Life & Pensions Moneyfacts Awards 2020
Best Wrap/Platform – Winner
Best Pension Service – Winner

Defaqto Service Ratings 2020
Platform Service - Gold

Adviser Asset Platform Ratings - 2020
Platinum rating

Charges and investment terms

For details of Quilter's 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 Quilter'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 Quilter. Your adviser will provide you with further details.

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

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

Contact details

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