

Introducing AJ Bell Investcentre

“The quality of our low-cost, easy-to-use investment platform enables us to continue to attract customers and assets and this is reflected in our strong financial performance.”

“Our financial strength allows us to continue to invest in the platform to achieve our ambition of becoming the easiest platform to use, underpinning our principal purpose of helping people to invest. This core focus on meeting the needs of advisers and customers, alongside our competitive pricing and high-quality service model, means we are well positioned to capitalise on the growing market for investment platforms in the coming years.”

Andy Bell, Chief Executive



Business overview

- Co-founded by Andy Bell in 1995, AJ Bell is one of the largest investment platforms in the UK.
- At the heart of our business is a clear and simple purpose: “We help people to invest”.
- We do this by making our platform easy to use and great value, with a highly competitive pricing structure.
- Our platform gives customers access to a wide range of AJ Bell and third-party investment options via Self-Invested Personal Pensions (SIPPs), Individual Savings Accounts (ISAs) and General Investment Accounts (GIAs).
- AJ Bell listed on the London Stock Exchange’s Main Market in December 2018 (LSE: AJB) and subsequently entered the FTSE 250 in March 2019.

241,000

customers trust us with
their investments

£54.7 billion

of assets under
administration

850

employees



Profitability and financial strength

Since our foundation, we have demonstrated a strong track record of consistent, profitable growth. Today we look after £54.7 billion of assets on behalf of 241,000 customers, making us one of the UK's largest investment platforms. As a well-capitalised business, we are ideally placed to build on this success and continue serving the needs of our customers for many years to come.

“ ... AJ Bell leads the pack amongst large platforms with excellent profit margins, and a stable yield of assets.”

FinalytiQ, Platform Profitability Guide

Our proposition

- One of the UK's fastest-growing adviser platforms.
- A platform you can trust: used by UK FCA-authorized advisers with either advisory or full discretionary permissions.
- Account types to suit your needs: SIPPs, Stocks and Shares ISAs, Lifetime ISAs, General Investment Accounts (GIAs), Junior SIPPs, Junior ISAs, offshore bond accounts and a full range of income drawdown options.
- Wide investment range means you choose how your savings are invested: our range includes funds, Exchange-Traded Funds (ETFs), investment trusts, bonds and equities. We also offer full SIPP capability including commercial property.
- Your money goes further: low-cost approach with a focus on lowering charges wherever we can.

Investment choice

As part of the comprehensive investment choice available under our Funds & Shares Service, AJ Bell Investments provides access to a range of multi-asset investment solutions. These are simple, transparent, low-cost investment management solutions, delivered through a set of promises that cover:

- Our commitment on **choice** – We believe you are better served when you are empowered to find the solution that is right for you.
- Our commitment on **cost** – As a market leader on costs, we charge a fee of just 0.15% – no matter which solution you choose.
- Our commitment on **communication** – We want you to know just how we'll take care of your hard-earned savings.



The Sunday Times

100 Best Companies to Work For 2019



Money Marketing Awards

Best Platform, Best SIPP Provider
& Company of the Year 2019



the lang cat Awards

Advised Platform of the Year 2018

For further information, visit www.investcentre.co.uk/customer-area.



Please note that the value of investments, and any income from them, can go down as well as up, and you may not get back your original investment. We do not offer advice about the suitability of our products or any investments held within them. If you are unsure, please speak to your financial adviser.

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