For adviser use only

A smarter, simpler way to manage clients' financial plans

Contents

A letter from our CEO

Welcome to Transact

Thank you for taking the time to consider Transact for your business.

Transact is a market leading adviser investment platform offering custody, trading, tax wrappers, reporting for advisers and clients. We only distribute via UK financial advisers. This means our strategy "to make financial planning easier" is 100% focused on you!

What makes Transact unique is the quality of our in-house software and developers. Ultimately this helps us:

- deliver award-winning service and technical support
- offer a leading range of tax wrappers including onshore and offshore bonds
- deliver regular price reductions for all clients.

Our monthly platform releases mean we remain agile, refining and updating our technology to give you a platform with:

- over 90% of our processes online, putting you in control and saving time
- an approach to client consent that enables you to submit real-time bulk instructions making it easier to manage client assets
- a roadmap to deepen our integrations with other practice management systems, which will reduce rekeying and risk of error.

When you choose our platform, it is a partnership and we want your business to receive great service. Your Business Development Manager and Adviser Support Manager can support you online or at your offices, and you will have access to our highly skilled technical team who can deliver training or help with specific cases. We also provide online support and a regional service team who can process tasks and answer client queries.

Everyone at Transact is excited to welcome you to our platform and we look forward to working with you.

Kind regards,
Tom Dunbar
Chief Executive Officer
Transact

Transact for your business

Choosing the right platform for your business is vital if it is to grow and flourish

Transact is designed to help you manage complex financial plans for your clients.

The benefits for business owners/ MDs/CEOs

We can help you deliver a highly consistent approach across your business. You can then match the service you want to provide to individuals, or groups of clients, with similar needs. This can help you create a more scalable, consistent and ultimately profitable business model.

The benefits for individual advisers

We take care of the admin involved in financial planning, thus allowing you to concentrate on demonstrating your professional value to your clients, giving advice and planning their financial future.

The benefits for administrators/ office managers/support staff

We speed up much of the repetitive work you have to do to run your firm's administration. Our platform allows you to communicate more efficiently and to manage bulk transactions easily.

The benefits for paraplanners

The Transact platform offers breadth and flexibility which makes financial planning easier for you. For example, you can switch existing investments between Wrappers – to ISAs and pensions – all online, so that your clients can easily take advantage of the tax breaks available. You can also save time by creating multiple investor reports in seconds rather than days.

We help you eliminate the need to duplicate detailed research. Our Transact Sales & Online Support team can produce detailed due diligence reports for you and reduce the amount of time you need to spend.

Overall, we make your life easier and leave you with time to think more strategically about bigger issues – such as tax planning.

Supporting business efficiency

Our platform service is designed to improve the efficiency of your firm and to help you run a profitable business.

Digital processes, simpler administration, automated investor reporting and record keeping, plus online client approvals, give you time to concentrate on adding real value for your clients.

Our processes are designed to provide better ways of working – building in time-savers and efficiencies. We then develop software to support the most efficient process.

The digitalisation of our platform is progressing rapidly. Already, over 90% of our application processes are fully digital – this means less paper, less errors and better security for our users.

We combine technology with high-calibre staff to provide market-leading service. Our proactive approach means we are able to anticipate potential issues and ensure things are done right the first time. We know that not everything can, or should, be automated, so we apply the personal touch when it's needed.

Adviser charging options

Our role is to help you run your business. This includes facilitating the payment of your adviser fees. With many payment options available, you can choose whatever method of remuneration suits you best, provided it is agreed with your client. This may take the form of ad valorem charges, both initial and annual. Or, it may take the form of ad hoc fees, retainers or regular fees, or a mixture. You can also choose to tier your fees depending on the agreement you make with your client.

We make payments from your clients' cash held on Transact. Your clients can elect to designate a particular Wrapper as a 'fee payment wrapper' to pay charges, such as your adviser fees, for other Wrappers. This is especially useful when using Bond and ISA Wrappers.

Request a service review

With the demands of a rapidly changing market, you may be unsure which platform services are right for you and your clients. You may need more than one platform to match your clients' needs with the most appropriate service, assets, tax wrappers and other financial products.

Your Transact Business Development Manager can help you determine what might suit your practice and your clients. A review can determine the best combination of services – even if Transact wouldn't suit.

The Transact difference

We do things differently

We provide uncomplicated, functional market-leading software combined with direct access to personal service. With no tedious call routing system, call centre mentality or outsourcing, we break the mould and don't behave like a stereotypical service provider.

We are a platform specialist 100% focussed on the UK adviser market. We won't ever go direct to clients or build our own advice business. We will continue to invest in additional services to support you.

More than an online service

- Excellent customer service is at the heart of our success
- We put advisers in control
- We provide the broadest Wrapper and asset range
- We are constantly innovating to provide new functionality and reporting tools to help advisers to get the most out of Transact Online, whilst reducing the re-keying of data
- We provide value for money and extensive adviser support not just over the phone, but through Live Chat and Co-browse
- We are a 'compulsive insourcer'
- We own our tax Wrapper providers
- We provide flexible adviser payment options.

Transact is run on proprietary software

We write and develop our own software which enables numerous and bespoke changes to be made rapidly.

Not hamstrung by an off-the-shelf platform package, we release monthly system updates and prioritise enhancements based on our own business needs. We do not make changes in isolation. We make them after careful consultation with adviser users.

Data sharing and API

We want to help advisers to save time and reduce re-keying errors by improving how we share data. The Transact API provides two-way connectivity with many adviser back-office software providers. Seamlessly integrating your business with Transact via our valuation, fee reconcilation and transaction data connections. Plus, we offer an account opening connection, enabling you to create illustrations quickly using data imported directly from some of the leading CRM providers, making your business more efficient.

Service and support

Service is the most important part of our business

You and all your staff have the same access to the support we provide. That includes from the initial meeting with a Business Development Manager (BDM), to operational support and help from our Technical Services team for specific client queries.

You can also set up Secondary Users on Transact Online allowing you to tailor the level of access for each individual in your firm.

Setting up

Our BDMs support you in your initial onboarding. Typically, after five cases, your Adviser Support Manager steps in to provide you with ongoing training and support. We can provide tailored training over the phone or face-to-face in your office.

Adviser and firm support

Our Sales & Online Support team helps you with the day-to-day checks needed to manage your adviser firm's permissions, platform access and logins. They also provide you with ongoing support on how to use the platform. You can contact them by email, phone, and via Live Chat or Co-browse. Co-browsing involves screen sharing so that we can guide you through features and processes in real time.

We run regular regional Transact Connect and Breakfast events across the UK as well as webinar events. Our events include presentations on the latest industry news, Transact Online developments, bite-sized Technical sessions, as well as an opportunity to meet Transact staff virtually or in person.

Client Operations at Head Office

Our teams support advisers in small geographical regions. Each team has around 8-10 Client Service Managers (CSMs), a Supervisor, and a Transfers, Technical and Legal & Compliance Specialist.

Having direct contact with your team allows you to build relationships. This creates familiarity with ways of working and ensures instructions are made accurately and executed in a timely way.

Technical Services team

The team is at hand to help you with more complex questions on trusts, issues involving taxation, and client specific queries. You can contact them directly, by email or phone.

Asset Servicing team

You can contact our Asset Servicing team to request the addition of investment products not currently available on the platform.

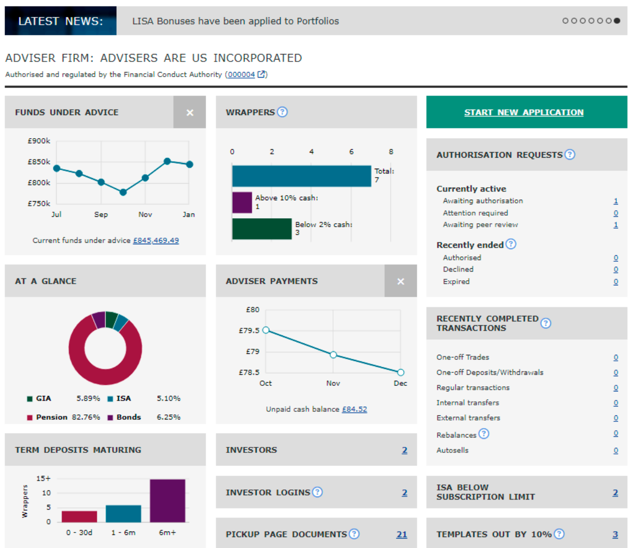
Our technology – Transact Online

Since we launched in 2000, we have continually improved our service, both online and offline

Here is just some of what we have to offer

Adviser dashboard

This provides a centralised, integrated view of your clients' portfolios. You can see recent activity and outstanding actions, and access reports on just about any aspect of your clients' portfolios.



Investor dashboard

This gives your clients a single view of their financial position at any time. They have access to much functionality, so that they can be as involved as much or as little as they like. With the ability to make deposits, instruct withdrawals and buy or sell assets, your clients can become more involved in their wealth management and better appreciate the service you provide.

Simplified business tasks for efficiency

- With our easy to use platform you can:
- Run all clients' portfolios online
- Create daily valuations and transaction histories
- Analyse performance by portfolio and asset
- Move assets between Wrappers – such as GIA to ISA and GIA to Pension
- Onboard clients with ease with Guided Applications. This provides more automation, consolidates applications and requires fewer signatures. It also provides accuracy with up-front data validation, which means less chance of delays
- Sign and send documents digitally using any e-signature provider and our Upload Documents tool
- Notify us of a forthcoming bank transfer and tee-up any buys at the same time, if you wish, using Expected Deposits.

Broad investment choice

Wide range of tax efficient Wrappers including:

- General Investment Account (GIA)
- ISA (Cash and Stocks & Shares)
- Lifetime ISA
- JISA (Cash and Stocks & Shares)
- SIPP
- Personal Pension
- Section 32 Buy-Out Bond
- Onshore Bond
- Offshore Bond.

You can access Transact's extensive asset range by setting up a GIA and linking it to a third-party product such as a SIPP, Pension, Trust or Bond.

Wide range of investment options including:

- Investment trusts
- Unit trusts
- OEICs
- Listed shares
- VCTs
- Term deposits
- Exchange traded funds
- Government bonds
- Corporate bonds
- Structured products.

You can also access institutional fund classes and other investment opportunities that aren't always available to investors directly.

Client management reports

Performance Analysis – allows you to create a suite of reports, such as value over time, asset performance and internal rate of return, that can help you determine the performance of a client's portfolio.

Portfolio Valuation – allows you to generate current and historical portfolio valuations and cash breakdowns of individual and linked portfolios.

Capital Gains – provides you with information at an individual level (taking into account joint portfolios, if linked).

Income tax reporting and certificates – supports you with easier, better tax planning.

Automated excess income reporting – included in annual tax reporting and available via online reports on the platform, the report saves time and can help improve accuracy.

ISA subscriptions and pension contribution summaries – helps you to maximise clients' ISA and pension allowances.

Transact Online was the first platform to introduce:

- Investor authorisation
- Lifetime ISA
- Peer review

Portfolio Valuation (Sample)

Advisers Are Us Incorporated
1056 Palace Road
London
Kent KE7 9NT
Phone: 020 7609 4900

COMPANY
SLOGAN HERE

Ms P K Drayton
17 March 2022

Adviser: Peter Johnson

Transact Portfolio Valuation - as of 17 March 2022

General Investment Account

Investment	Original Cost~	Units/Shares	Price	Value	Gain/Loss~
Cash				£5,609.72	
BAE Systems (BA.) *GB0002634946*	£10,018.06	1,907.0000	£7.2190	£13,766.63	37.4%
IntegraFin Holdings plc (IHP) *GB00BD45SH49*	£7,006.62	1,432.0000	£4.1690	£5,970.01	(14.8%)
Meituan-W (XHKG:3690) NON CREST *KYG596691041*	£12,777.85	1,300.0000	£16.4451	£21,378.63	67.3%
Roblox Corporation (XNYS:RBLX) *US7710491033*	£3,960.11	81.0000	£28.1739	£2,282.09	(42.4%)
Sea Ltd ADRs (XNYS:SE) *US81141R1005*	£4,568.44	17.0000	£67.4238	£1,146.20	(74.9%)
Taiwan Semiconductor Manufacturing ADR rep 5 Ords (TSM:NY) *US8740391003*	£2,940.14	33.0000	£76.2723	£2,516.99	(14.4%)
Total				**£52,670.27**	

ISA (Stocks/Shares)

Investment	Original Cost	Units/Shares	Price	Value	Gain/Loss
Cash				£638.49	
Aberdeen Emerging Mkts Infrastructure Equity GBP X (Acc) LUX *LU0925744665*	£129.79	12.8420	£12.2222	£156.96	20.9%
Apple Inc (XNAS:AAPL) *US0378331005*	£293.60	4.0000	£115.6989	£462.80	57.6%
Aviva Investors Global Equity Income Class 1 (Acc) *GB0030441918*	£343.82	214.0510	£2.1587	£462.07	34.4%
Avon Protection Plc (AVON) *GB0000667013*	£132.19	4.0000	£12.9850	£51.94	(60.7%)
AXA Framlington Biotech Z (Acc) *GB00B784NS11*	£427.64	120.4230	£4.2120	£507.22	18.6%
AXA Framlington Global Technology Z (Acc) *GB00B4W52V57*	£428.99	108.8450	£6.3790	£694.32	61.8%
Baillie Gifford Developed Asia Pacific B (Acc) *GB0030492044*	£344.39	63.6210	£6.1870	£393.62	14.3%
Baillie Gifford Pacific Class B (Inc) *GB0006063340*	£441.70	75.1840	£9.0960	£683.87	54.8%
Baillie Gifford UK Equity Alpha Class B (Inc) *GB0005857908*	£435.60	94.5610	£3.9560	£374.08	(14.1%)
Barings Hong Kong China A GBP (Inc) IRE *IE00B3YQ0H18*	£262.85	0.3030	£910.6900	£275.94	5.0%
BlackRock Global Long-Horizon Equity A2 USD (Acc) LUX *LU0011850046*	£369.77	8.7100	£65.4959	£570.47	54.3%
BNP Paribas Consumer Innovators Classic EUR (Acc) *LU0823411706*	£457.83	2.5600	£235.3569	£602.51	31.6%
BNY Mellon Global Equity Income USD C (Inc) IRE *IE00B3X1G796*	£431.55	377.0720	£1.4357	£541.36	25.4%
Clipper Logistics Plc (CLG) CA ANNOUNCED *GB00BMMV6B79*	£184.20	59.0000	£8.5550	£504.75	174.0%
Diageo (DGE) *GB0002374006*	£469.86	17.0000	£34.5825	£587.90	25.1%

Continued...

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Cash Summary – helps you to manage your clients' cash position.

Transfers-in Status Report – to highlight cases in progress.

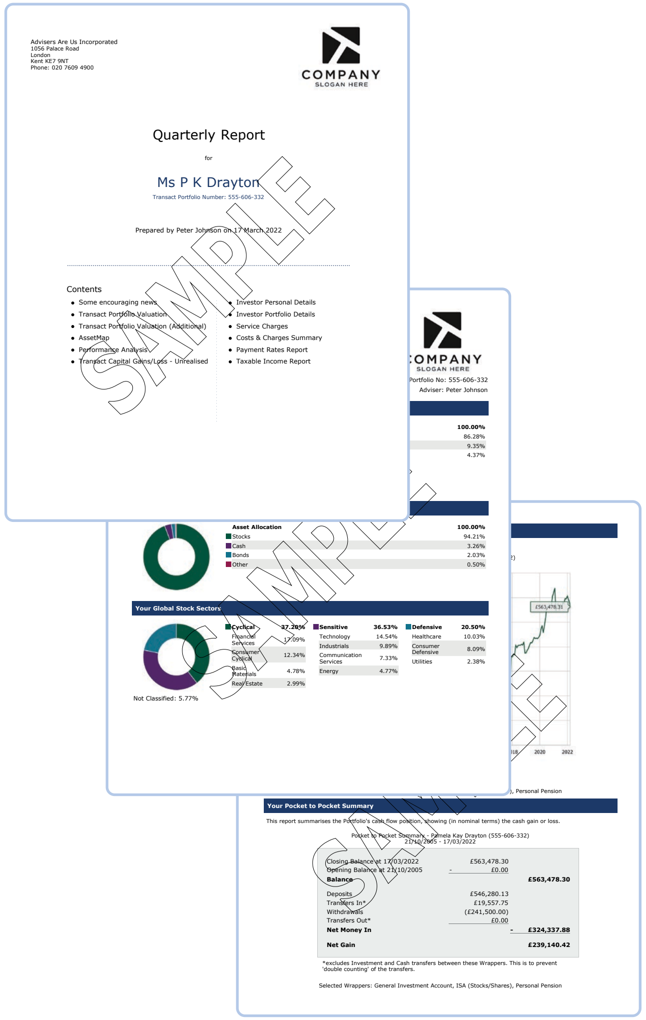
Bespoke portfolio reporting and analysis

Investor Report – allows you to create a customisable document with your brand that can be tailored for individual and specific client groups. You can add a personalised introduction and commentary, and select from a range of reports such as valuations and capital gains analysis.

AssetMap™ – provides you with a detailed analysis of clients' portfolios by summarising the asset allocation and concentration of investments held within them.

MoneyMap – allows you to quickly create 'all of life' planning scenarios to identify the funding required to maintain specific levels of lifestyle over time.

Investor Report (Sample)



Not already a Transact user?

Try a demo at

www.demo.transact-online.co.uk

Meet a Business Development Manager

020 7608 5350

salessupport@integrafin.co.uk

Working with others

We work with other financial service providers and experts to support your end-to-end business processes by offering integration with:

- **All the major back-office administration systems –** we can provide them with data to help you analyse your clients' needs.
- **Discretionary Investment Managers (DIMs) –** you can link clients' Wrappers to templates, also known as Model Portfolios, managed by over 130 DIMs. You can also facilitate a bespoke discretionary investment management service.
- **Self Invested Personal Pension (SIPP) providers –** you can access a wide range of SIPP providers who offer their services to advisers via Transact in addition to our own Transact SIPP.
- **Lifetime Cashflow Modelling Tools –** you can choose your preferred tool from our current integrations with Voyant, Truth, PPOLcalc and CashCalc.
- **Trust service providers –** in addition to the in-house support our Technical Support team provide, we have sourced a range of specialist trust service providers and trust bank accounts to help you protect your clients' wealth.

For full details of DIM, SIPP and trust providers available via Transact

Go to ***www.transact-online.co.uk*** and navigate to the ***Investing*** drop-down menu

Our charges

Transact is financially strong and follows a responsible pricing approach

Our charging structure is completely transparent.

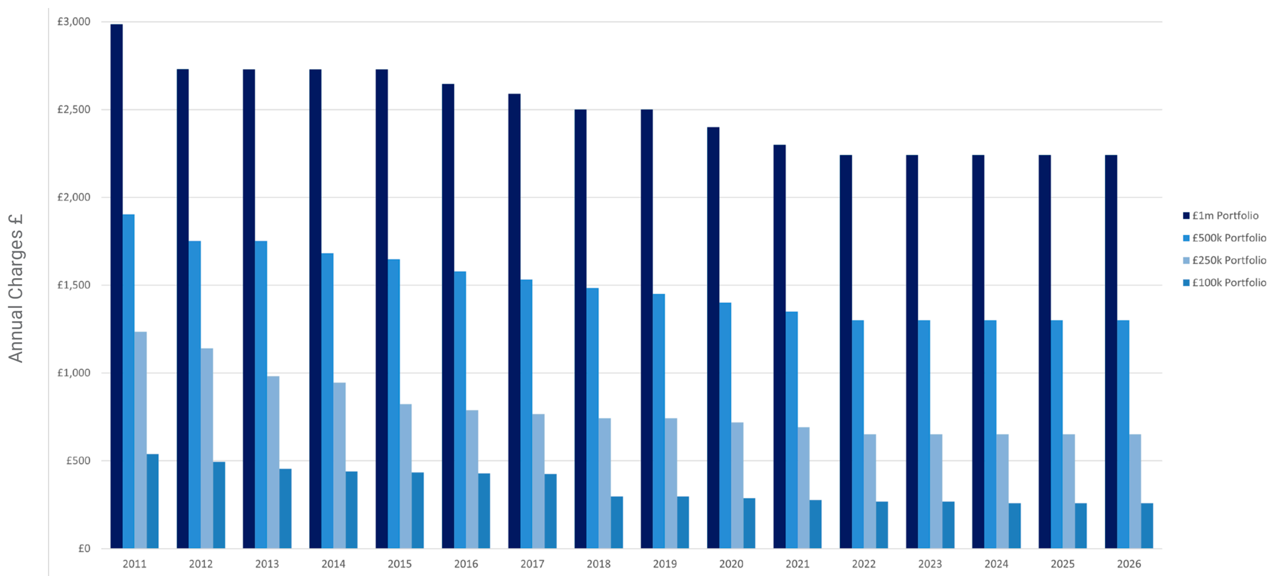
We state all of our charges – with no hidden extras

Transact offers outstanding value

The principles of our charging structure have remained the same since we started – to be both clear and transparent. We are totally committed to providing the best wrap service and the best value in the market, without threatening our financial strength, profitability or ability to deliver.

This is called ‘responsible pricing’, whereby we have reduced our charges over the years while continuing to add new functionality and maintain excellent levels of service. The graph below shows the reduction over time of our charges.

Transact charge reductions over time 2011–2026



Source: Transact – data includes Annual Charge and Buy Commission charges based on estimated portfolio split between cash and investments, and rate of investment.

Clear, transparent platform charges

We show separately each component involved in the financial planning process (the adviser, the investments and Transact) so you and your clients understand exactly what they are paying for.

Here is a summary of our current charges:

1 Brokerage charges

We levy a dealing charge on investments which are listed on or admitted to a stock exchange and also for Express Trades.

Family linking

We allow clients and their family to link portfolios, creating a higher portfolio value which can enable clients to benefit from lower overall charges. It's easy to overlook this important feature, so please contact us for further details.

2 Wrapper charges

Transact investment wrapper type	Quarterly fee
General Investment Account	£0
ISA, JISA	£3
Onshore Bond	£18
SIPP	£20
Personal Pension Plan	£20
Section 32 Buy-Out Bond	£20
Offshore Bond	£60

Notes on wrapper charges

ISA includes the Cash ISA, Stocks and Shares ISA and Lifetime ISA.

There is no quarterly fee for the children's SIPP, Personal Pension Plan and JISA wrappers in a linked family group until they reach age 18.

A single quarterly Personal Pension Plan or SIPP wrapper fee applies for clients in a linked family group. The fee is split equally among the number of members within the family group that hold an applicable wrapper. This discount applies to Personal Pension and SIPP wrappers separately.

3 Annual charge

Single or consolidated portfolios of less than £100,000	
£0 – <£60,000	0.50%
>£60,000 – <£100,000	0.26%

Single or consolidated portfolios of £100,000 and above	
£0 – £600,000	0.26%
>£600,000 – <£1,200,000	0.17%
>£1,200,000 – £5,000,000	0.07%
On the remainder	0.05%

For value for money, ease of use, financial strength and service, Transact is the market leader

The cost of using Transact

- Portfolios can be linked (on request) enabling clients to benefit from lower overall charges.
- All interest received on cash deposits is passed back to clients.
- There is only one charge per Wrapper type, regardless of how many additional Wrappers (of the same type) a client wants to open.
- There is no extra charge for additional administration of any kind.
- Transact does not charge for:
  - Re-registrations
  - Drawdown or income payments
  - Moving assets between Wrappers
  - Probate or ad hoc valuations.

Things Transact doesn't charge for but some others do

- Transfers in on pensions – can be £50 on other platforms.
- Pension drawdown – some platforms may charge up to £174 + VAT annually.

Source for platform pricing: Platforum pricing report, October 2025.

Our transparent charging is structured differently from our competitors

We state all of our charges – with no hidden extras. Often the various price comparison services leave out many of our competitors' additional charges and costs. These soon mount up and mean that before your clients realise, they could be paying considerably more than the headline rate promoted.

For full details of all our charges

Please contact us for a copy of our **Charges Schedule**

020 7608 5350

salessupport@integrafin.co.uk

A sustainable platform

A financially strong platform with an 'Excellent' profitability rating

IntegraFin Holdings plc ("IntegraFin") is the holding company for all of the entities involved in the provision of the Transact service, and is listed on the London Stock Exchange. IntegraFin has a strong record of consistently growing both revenue and operating profit, with profits after tax reaching £75.4 million for the year ending September 2025.

IntegraFin's latest published Report and Accounts are available on request or from the IntegraFin website.

An independent rating of Transact's financial strength can be found at ***akg.co.uk***.

IntegraFin has a strong record of consistently growing both revenue and operating profit

Few other platforms can demonstrate such a track record, and platforms that are only one part of a financial services group cannot be certain that their parent company will continue to invest in the face of ongoing losses. The last thing you or your clients want is to write the majority of your business with a platform, only to find them leaving the market sometime later.

It is important to ensure that a platform works for you, your business, and your clients, and will be in the market for the long term.

Transact in numbers

Funds under direction

£77.8bn

Underlying pre-tax profit (FY2025)

£75.4m

Clients

254,000

Funds under direction and client numbers as at 31 March 2026. Profit for IntegraFin Holdings plc for financial year to 30 September 2025.

Independent platform research

No.1 for overall satisfaction among primary platform users

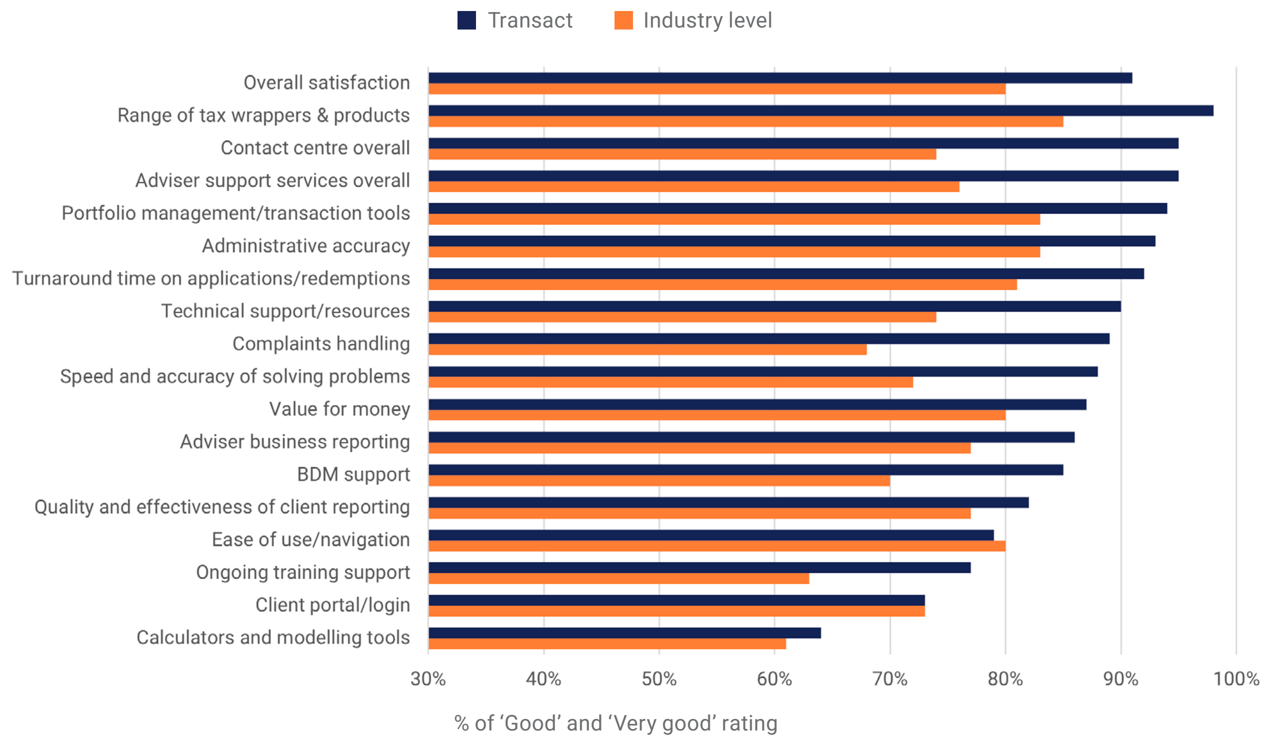
Thousands of advisers have already discovered the strengths of Transact

Investment Trends

Investment Trends is an independent research company that completed a 2026 survey of 911 UK advisory professionals. In the survey, Transact:

- was rated the highest platform for satisfaction among financial advisers who use it as their primary platform.
- achieved the highest Net Promoter Score* among financial advisers, across both primary and secondary platform users.
- earned the strongest advocacy from financial advisers who use it as their primary platform.

How would you rate your primary/secondary platform in the following areas?



Base size varies for each category: Transact [n= 90 - 125] Industry level [n=681 - 986]

*Net Promoter Score is a metric used to measure how likely a customer is to recommend a company's service to others.

Source for all data: Investment Trends 2026 UK Adviser Technology and Business Report

Our awards

Thanks to advisers' continued support and the hard work of our teams, we've picked up many awards over the years

2012

FTADVISER.COM
5 Star Winner – Online Investment Providers

INVESTMENT LIFE & PENSIONS MONEYFACTS
Best Online Service

CITYWIRE ADVISERS' CHOICE PLATFORM AWARDS
- Tools and Functionality
- Charging and Service
- Investment

FINANCIAL ADVISER
5 Star Winner – Investment Provider/ Packager

2013

FINANCIAL ADVISER SERVICE AWARDS
5 Star Investment Provider/Packager

MONEY MARKETING
Best Wrap or Platform

PLATFORUM
Best Adviser Platform

FT ADVISER ONLINE SERVICE AWARDS
5 Star Investment Provider

INVESTMENT LIFE & PENSIONS MONEYFACTS
Best Online Service

2014

FINANCIAL ADVISER SERVICE AWARDS
5 Star Investment Provider/Packager

MONEY MARKETING
Best Wrap or Platform

PLATFORUM
Best Adviser Platform

FT ADVISER ONLINE SERVICE AWARDS
5 Star Investment Provider

INVESTMENT LIFE & PENSIONS MONEYFACTS
Best Online Service

2015

PROFESSIONAL ADVISER
Best Adviser Platform

FT ADVISER ONLINE SERVICE AWARDS
5 Star Investment Provider

MONEYFACTS
Best Online Service Award

PLATFORUM
Best Adviser Platform over £10bn

FINANCIAL ADVISER SERVICE AWARDS
5 Star Investment Provider/Packager

2016

PLATFORUM
- Best Adviser Platform over £10bn
- Best Adviser Platform for Service
- Best Platform Partner Voted by DFMs

THE LANG CAT
- Platform of the Year
- Best for Centralised Investment Proposition

MONEYFACTS
Best Wrap/Platform

UK PLATFORM AWARDS
Platform of the Decade

FT ADVISER ONLINE INNOVATION AND SERVICE AWARDS
5 Star Investment Provider

MONEY MARKETING
Best Platform Award

ADVISER ASSET
Platinum Platform Rating

2017

PROFESSIONAL ADVISER
Best Platform for Advisers (AUA above £15bn)

PROFESSIONAL PARAPLANNER
Best Overall Service for New Business

MONEY MARKETING
Best Platform Award

FT ADVISER ONLINE INNOVATION AND SERVICE AWARDS
- Investment Innovation Award
- 5 Star Investment Award

MONEYFACTS
Best Wrap/Platform

MONEY OBSERVER RETIREMENT INCOME AWARDS
Best Flexi Access Drawdown

FINANCIAL ADVISER SERVICE AWARDS
5 Star Investment Provider

2018

PLATFORUM
Best Adviser Platform over £10bn

PROFESSIONAL ADVISER
Best Platform for Advisers (AUA above £15bn)

PROFESSIONAL PARAPLANNER
Best Platform

PROFESSIONAL PARAPLANNER
Best Overall Service – Existing Business

FINANCIAL ADVISER SERVICE AWARDS
5 Star Investment Provider

ADVISER ASSET
Platinum Platform Rating

2019

PROFESSIONAL ADVISER
Best Platform for Advisers (AUA over £20bn)

PROFESSIONAL PARAPLANNER
Best Platform

FINANCIAL ADVISER SERVICE AWARDS
5 Star Investment Provider

ADVISER ASSET
Platinum Platform Rating

2020

ADVISER ASSET
Platinum Platform Rating

FINANCIAL ADVISER SERVICE AWARDS
5 Star Platform

2021

ADVISER ASSET
Platinum Platform Rating

PROFESSIONAL PARAPLANNER
Best Platform

PROFESSIONAL PARAPLANNER
Best Overall Service to Paraplanners – Existing Business

MONEYFACTS
Best Wrap/Platform

SCHRODERS
Best Platform Provider AUM +£40bn

2022

ADVISER ASSET
Platinum Platform Rating

PROFESSIONAL ADVISER
Best Platform for Advisers (AUM above £25bn)

PROFESSIONAL ADVISER
(Time4Advice) Best Technology Provider

PROFESSIONAL PARAPLANNER
Best Overall Service to Paraplanners - New Business

PROFESSIONAL PARAPLANNER
Best Platform

INVESTMENT LIFE & PENSIONS MONEYFACTS
Best Online Service

2023

ADVISER ASSET
Platinum Platform Rating

PROFESSIONAL PARAPLANNER
Best Platform

PROFESSIONAL PARAPLANNER
Best Overall Service to Paraplanners – Existing Business

SCHRODERS
Platform of the Year

SCHRODERS
Leading Platform for Discretionary Management

2024

PROFESSIONAL ADVISER
Best Platform for Advisers

PROFESSIONAL PARAPLANNER
Best Overall Service to Paraplanners – New Business

SCHRODERS
Best Platform Provider (AUM over £40bn)

SCHRODERS
Leading Platform for Discretionary Management

2025

PROFESSIONAL PARAPLANNER
Best Platform

MONEY MARKETING
Best Platform

SCHRODERS
Best Use of Platform Technology

WHICH?
Recommended provider for pension drawdown

Get in touch

020 7608 5350

transact-online.co.uk

Phone lines are open from 8am to 6pm, Monday to Friday (excluding Bank Holidays). Calls may be recorded.

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M001 Version (33) May 2026