

Understanding your platform

About Transact

Transact is a leading UK investment platform. Our user-friendly platform and personal service enable you to manage your financial portfolio in an efficient and convenient way.

WE ARE
TRUSTED
BY OVER 240k
UK INVESTORS

What we do



We hold your financial assets and portfolio in one secure, online place.



We facilitate the purchase and sale of investments.



We provide reporting tools to help you manage your portfolio and investments.

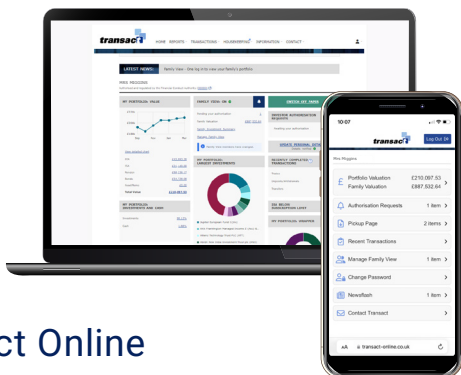


We provide a wide range of assets and tax wrappers to give you true flexibility in how you invest your money.

Transact Online

Transact Online is the name of our secure online platform – it is available via desktop and mobile device. You can log in by visiting: user.transact-online.co.uk

Our desktop site gives you access to the full suite of features we offer. Our mobile site gives you quick access to key information such as valuations and important documents.



You can do more with Transact Online

There is a wide range of features available to you on our platform.

	Desktop	Mobile
Access documents	✓	✓
View portfolio valuation	✓	✓
Change password	✓	✓
View family-linked portfolios	✓	✓
View recent transactions	✓	✓
Change password	✓	✓
Switch to online communications	✓	✗
Instruct trades	✓	✗
Update contact details	✓	✗
Set up multi-factor authentication	✓	✓

Want to know how to use Transact Online?

Watch a short video on the key features of our platform here transact-online.co.uk/using-transact-an-introduction-for-clients

Add your email and switch to online communications

If we have your email address on file, you can switch to online communications to reduce the amount of paper you receive and gain online access to documents we send you, such as quarterly statements and contract notes. If you choose to receive email notifications, we'll email you whenever a new document is added.

Simply log in to Transact Online, go to **Account Settings**, and select **Preferences**.

Some of our recent awards:

2025

PROFESSIONAL PARAPLANNER Best Platform

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

2023

ADVISER ASSET Platinum Platform Rating

PROFESSIONAL PARAPLANNER Best Platform

PROFESSIONAL PARAPLANNER Best Overall Service to Paraplanners
– Existing Business

SCHRODERS Leading Platform for Discretionary Management

SCHRODERS Platform of the Year

2022

ADVISER ASSET Platinum Platform Rating

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

PROFESSIONAL PARAPLANNER Best Overall Service to Paraplanners
– New Business

PROFESSIONAL PARAPLANNER Best Platform

INVESTMENT LIFE & PENSIONS MONEYFACTS Best Online Service



M332 Version (5) September 2025

"Transact" is operated by Integrated Financial Arrangements Ltd, 4th Floor, 2 Gresham Street, London EC2V 7AD
| Tel: (020) 7608 4900 | Email: info@transact-online.co.uk | Web: www.transact-online.co.uk | (Registered office:
as above; Registered in England and Wales under number: 03727592) | Authorised and regulated by the Financial
Conduct Authority (entered on the Financial Services Register under number: 190856)