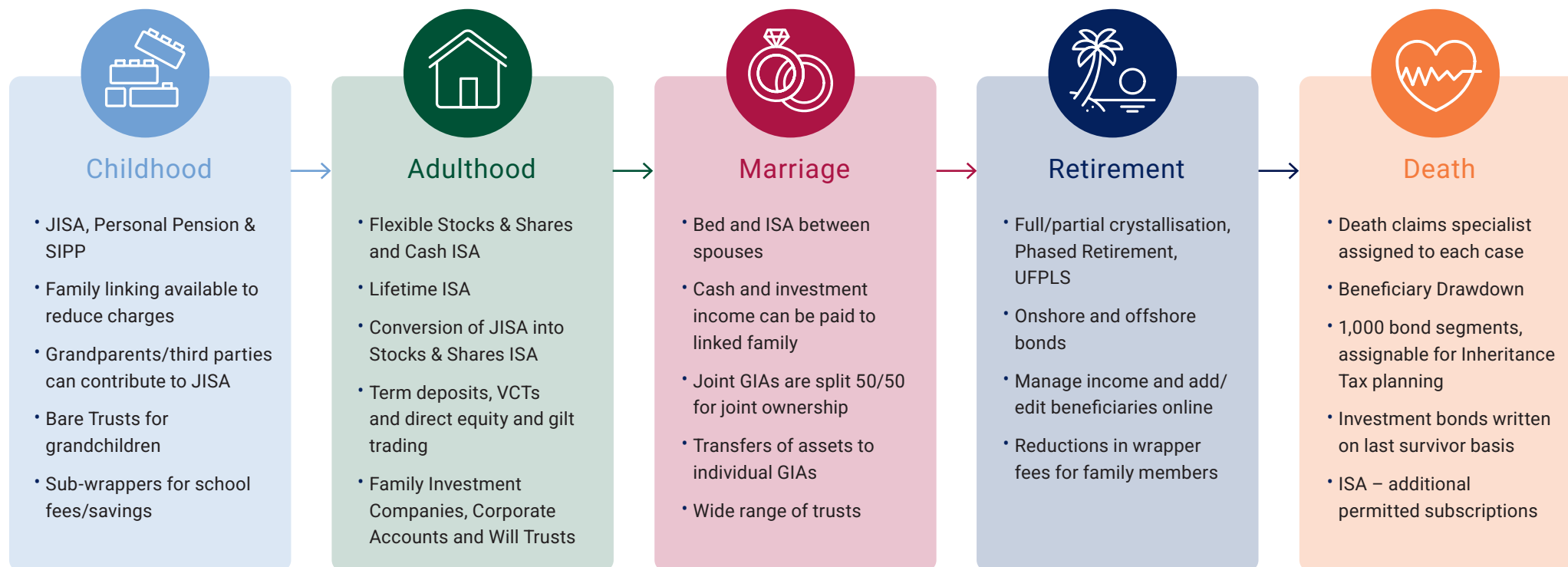


Intergenerational planning

Find out about the features of Transact's award-winning online platform and how it supports financial planning across the generations.



Illustrations and Applications

- Available for Junior ISA, Lifetime ISA, Joint GIA and beneficiary drawdown.
- Option to remove wider family's total portfolio value from illustrations.
- Most processes can be completed online without wet signatures.

Client access

- Clients can view their investments through their mobile or desktop.
- They can view their entire family's portfolio through a single login.
- We employ multi-factor authentication via desktop to keep their assets safe and secure.