Transact: An Introduction

Launched in 2000 as the UK's first investment platform, Transact is a secure, award winning investment service. It is designed to hold your financial investments like funds, shares and cash across a wide range of tax-efficient investment wrappers (such ISAs and pensions) in one, centralised place.

Over 3,000 UK advisory firms independently choose our leading and trusted platform on which to manage clients' portfolios.

We take care of much of the complexity that wealth management involves, giving you and your adviser the tools needed to achieve your financial aims.

Here's how it works:

- Your adviser, who is independent of Transact, develops a plan to help meet your financial aims.
- Using Transact, your adviser implements the agreed plan.
- We then action your adviser's instructions by opening the necessary wrappers and purchasing the funds or shares.
- We also provide your adviser with portfolio management tools, and support from our highly-trained Client Service Managers.

For complete transparency, our fees and your adviser's fees are administered and reported separately.

So how can we help you?
We offer a wide range of wrappers and access to over 8,000 funds, plus bank term deposits and assets listed on major stock markets. We remain agnostic about which funds you and your adviser choose, giving you total flexibility in how you invest.

Simply log into your dashboard and view your Portfolio at any time. You can see the latest valuation, view all transactions and submit instructions in a secure, user-friendly environment. Furthermore, you can link your Portfolio with immediate family members to qualify for even lower charges.

So why choose us?
Our award-winning platform has thousands of satisfied customers and is consistently rated the best platform by advisers. The group companies which provide the Transact wrappers are fully regulated.

To find out more about how we could work for you, simply contact your financial adviser.

Transact, take control.

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