For financial advisers only

10 good reasons to use our platform

As the largest platform in the UK[1] we want to go beyond transacting and help you build a robust savings journey for every client throughout their lifetime.

1 A dedicated adviser platform

We're totally focused on serving advisers like you – not competing with you. Working in partnership, we provide products and services to help you create financial planning solutions to get your clients closer to their financial goals.

2 Ability to adapt and grow

We look after over £216 billion assets[2] on behalf of savers and investors in the UK. Our size and financial strength help us to meet the changing needs of you and your clients:

- We can price ourselves competitively.
- Our business can adapt quickly and respond to changing environments.
- We can provide stability and operational capability.
- We're able to continually invest in and develop our platform.

3 Sustainability matters

Our purpose of helping people achieve a lifetime of financial security guides everything we do. We're passionate about making a difference and realise that everything we do matters, from recycling, to how we travel, offering responsible investment options and donating to charity or volunteering.

Making a positive impact is a key element of our strategy and is integral to our daily decision making. What we do really matters, and we recognise that as a business we can, and want to, make a difference.

4 Back-office integration

We work closely with leading suppliers of adviser software systems so we can easily integrate the platform with your business. And, it means we can share client, product and transaction information with your systems automatically – helping your business run more efficiently.

[1] Source: Fundscape, Q4 2023 article

[2] Correct as at 30 June 2024

5 Easy to do business

By simplifying administration and putting you firmly in control, it means you can identify business opportunities to strengthen your sales revenue and reduce your operational overheads. Plus, we don't need a signature for our key online transactions (including new business, withdrawals and trading).

6 Service excellence

We have a comprehensive support team, including:

- Regional Account Managers
- Platform Consultants
- Customer Service
- Tax and Trust Manager
- Pensions Technical
- Regional support

So no matter the nature of the enquiry, or where you are in the country, we have experts on hand for you and your clients' needs.

Although we believe in bringing you regular and direct contact with your Aegon representative, we understand this doesn't work for everyone. That's why we also offer a whole host of training and resources online from questions and answers to step-by-step guides available to download, save and print so you can easily train your support staff as you go.

7 Centralised control

The design of user roles and permissions help you to apply tighter governance... and reduce the risk of individuals performing tasks that are outside of their role:

- You can set up your investment proposition as a default.
- We provide the information to monitor use by other user roles – reducing risk.
- You have the ability to decide the level of access your clients should have (if any).
- Our suite of management information allows you to easily reconcile your charge payments.

8 Multi-asset portfolio management

We're committed to providing high quality, value for money solutions that are run and governed by experts. And our six Risk-Managed Portfolios are designed to make investing easier, focused on value and different client risk preferences – suitable for pension, ISA and GIA clients. The value of an investment can fall as well as rise and isn't guaranteed. Your client could get back less than they invest.

9 Ability to give your client's control

Give your clients online access to help them engage with their investments. Your clients will benefit from a view of all the investments they hold with us on the platform and our range of services, giving you more time to help them achieve their financial ambitions.

10 Platform tools

Our core online portfolio planning tools are available to support client servicing:

- Research Centre – browse and compare the funds on offer, see fund charges and objectives and monitor performance.
- Capital gains tax (CGT) tool – gives you the information you need to manage your clients' CGT liabilities.
- Portfolio scan – a product level tool enabling you to see how the funds in your client's portfolios work together. Plus it gives you tailored reporting so you can see the asset mix, performance and holdings.
- Report Zone – benefit from management reporting that helps you identify opportunities, keep track of business and demonstrate the value of your advice.
- Product reporting tool - Aegon Retirement Choices' tool includes customisable date range and product selection, and graphical representation of the valuation and the performance of your client's account.

Contact us

To find out more about our platforms speak to your usual Aegon contact or visit **aegon.co.uk/support**

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