

# Introducing AJ Bell Investcentre

“The quality of our low-cost, easy-to-use investment platform enables us to continue to attract customers and assets and this is reflected in our strong financial performance.

“Our financial strength allows us to continue to invest in the platform to achieve our ambition of becoming the easiest platform to use, underpinning our principal purpose of helping people to invest. This core focus on meeting the needs of advisers and customers, alongside our competitive pricing and high-quality service model, means we are well positioned to capitalise on the growing market for investment platforms in the coming years.”

**Andy Bell, Chief Executive**



## Business overview

- Co-founded by Andy Bell in 1995, AJ Bell is one of the largest investment platforms in the UK.
- At the heart of our business is a clear and simple purpose: “We help people to invest”.
- We do this by making our platform easy to use and great value, with a highly competitive pricing structure.
- Our platform gives customers access to a wide range of AJ Bell and third-party investment options via Self-Invested Personal Pensions (SIPPs), Individual Savings Accounts (ISAs) and General Investment Accounts (GIAs).
- AJ Bell listed on the London Stock Exchange’s Main Market in December 2018 (LSE: AJB) and subsequently entered the FTSE 250 in March 2019.

**418,000**

customers trust us with  
their investments

**£74.1 billion**

of assets under  
administration

**1,000**

employees



## Profitability and financial strength

Since our foundation, we have demonstrated a strong track record of consistent, profitable growth. Today we look after £74.1 billion of assets on behalf of 418,000 customers, making us one of the UK's largest investment platforms. As a well-capitalised business, we are ideally placed to build on this success and continue serving the needs of our customers for many years to come.

“ ... AJ Bell leads the pack amongst large platforms with excellent profit margins, and a stable yield of assets.”

FinalytiQ, Platform Profitability Guide

## Our proposition

- One of the UK's fastest-growing adviser platforms.
- A platform you can trust: used by UK FCA-authorized advisers with either advisory or full discretionary permissions.
- A range of product options that includes a Retirement Investment Account, SIPP, Stocks and Shares ISA, Lifetime ISA, General Investment Account (GIA), Junior SIPP, Junior ISA, offshore bond and a full range of income drawdown options.
- Wide investment range means you choose how your savings are invested: our range includes funds, Exchange-Traded Funds (ETFs), investment trusts, bonds and equities. We also offer 'whole-of-market' investments, including access to external bank accounts and fixed-term deposits, through our SIPP.
- Our low-cost approach means your money goes further: a focus on reducing charges to you with platform custody charges from 0.00% p.a. to 0.25% p.a.

## Investment choice

As part of the comprehensive investment choice available under our Funds & Shares Service, AJ Bell Investments provides access to a range of multi-asset investment solutions. These are simple, transparent, low-cost investment management solutions, delivered through a set of promises that cover:

- Our commitment on **choice** – We believe you are better served when you are empowered to find the solution that is right for you.
- Our commitment on **cost** – As a market leader on costs, we charge a fee of just 0.15% p.a. for both our Managed Portfolio Service and Funds – no matter which solution you choose.
- Our commitment on **communication** – We want you to know just how we'll take care of your hard-earned savings.



Please note that the value of investments, and any income from them, can go down as well as up, and you may not get back your original investment. We do not offer advice about the suitability of our products or any investments held within them. If you are unsure, please speak to your financial adviser.

## Functionality

Making investing easy and streamlined is at the forefront of everything we do. That's why we provide your adviser with access to a range of online functionality to help them manage your portfolio more efficiently, including:

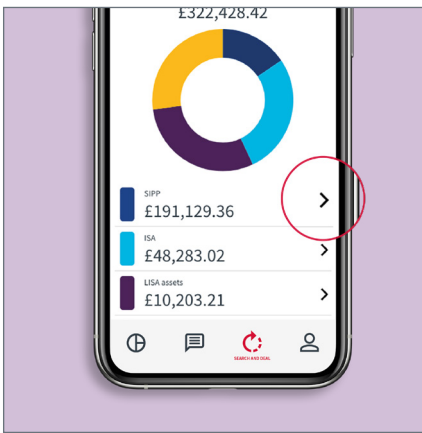
- easy-to-use online applications;
- automated transfers;
- cash management and reporting tools;
- Capital Gains Tax calculator;
- and much more.

## Easy access to your account

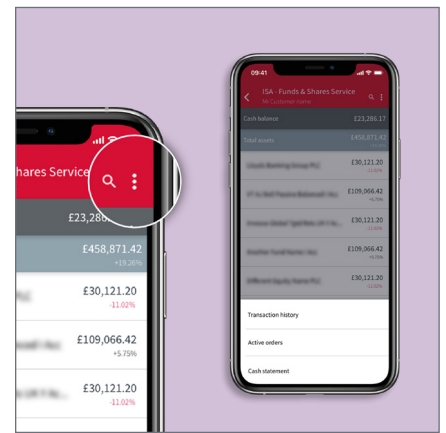
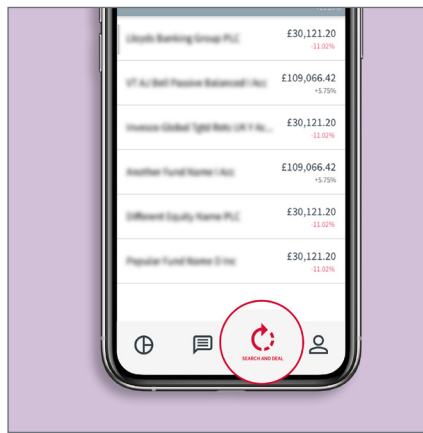
Finding all the information you need is simple: just head over to the AJ Bell Investcentre client website and click the 'Log in' button located on the top menu bar, or go to [investcentre.co.uk/LogIn/Username](https://investcentre.co.uk/LogIn/Username), and enter your credentials to access your account.

You can also keep track of your finances on the move using our app. Our continuous updates ensure you receive quick and easy access to your transaction and portfolio information through our improved user interface, and you can also view dividend payments and corporate actions, and more.

### Transaction and portfolio information



### Dividend payments and corporate actions



Once you're ready, simply head over to either the iOS or Android store and download our app.



## Award-winning service



**Professional Adviser Awards**  
Best Platform for Advisers  
(AUA over £25bn) 2021



**UK Platform Awards**  
Leading Retirement  
Proposition 2021



**Money Marketing Awards**  
Best Platform 2021  
Provider of the Year 2021



**The Sunday Times**  
100 Best Companies  
to Work For 2021

For further information, visit [www.investcentre.co.uk/client](https://www.investcentre.co.uk/client)

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