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Best Global Wrap Platform 2016

Platform One

a premium service for private investors

Platform One was launched in August 2011, by a group of companies and private investors with a shared vision of creating a premium online investment platform, offering both UK and international services. This service enables financial advisers to consolidate and manage all of their high net worth clients' investments in one place - a 'wrap' platform.

Platform One provides three main services for its clients: a premium UK service with a very wide range of products and investments for advised HNW clients and their financial advisers; an international service offering for jurisdictions and advisers who need a fee based multicurrency platform; and a global multi-currency commission based service for international advisers in jurisdictions that allow the payment of commissions.

Platform One can also provide specialist services for international regular savings and pension plans, alternative investments, model portfolios and IBP investment funds such as CDFC funds.

A key part of their service offering is providing a consolidated portfolio view for its advisers and clients, thus enabling them to see and manage all their investments in one place, regardless of which Platform One's services - UK, international or specialist - they utilise. In addition to the standard products and investments available on most general platforms, Platform One also provides access to specialist products and services which other platforms are unable to handle. These include specialist trusts, IHT Plans, Foundations, Open Annuities, UK and international DFMs, EIS investments, specialist international pensions, and AIM ISA and BPR investment companies.

Platform One is seeking to help adviser firms as they face the significant challenges associated with regulation increases across the international adviser market. They are assisting adviser firms, in all jurisdictions, to manage the impact of these changes to their business and support them through the process. Platform One believes that the trade press also has a vital role to play in helping international advisers recognise the potential impacts of these changes and understand the strategies that they can employ to benefit from them.

There are a number of important developments, both major and minor, that Platform One are making to their services over the next few months

for their clients benefit. They are introducing additional trading services for equities, ETFs, Investment Trusts and corporate bonds, and have created a new 'alternative investments zone' for the UK market and advised HNW clients, amongst other exciting projects.

