

PRESS RELEASE

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Private equity firm backs Platform One

Platform One Limited, the UK and international Wrap company that provides a premium investment platform for advised high net worth clients, has received the backing of the London based Private Equity firm, Forester MacLean.

Forester MacLean has taken a significant minority stake in the business. It follows the recent acquisition by Forester MacLean of the John Good Group, the specialist design and printing business that provides high quality publications and programs for theatres, arts organisations and the entertainment industry.

Platform One was launched in August 2011 to provide both a UK and an international Wrap service and to offer specialist products and services for high net worth clients. It is aimed at top tier adviser firms and multiple Family Offices.

Michael Burt, Managing Director of Forester MacLean, expressed his pleasure in the deal and said: "We see the market potential of Platform One as it is the only platform offering a service for high net worth clients in the UK and the only Wrap platform also providing an international service". He continued: "The investment opportunity that the company presented was compelling, particularly given its experienced management, the commitment of its founding partner firms, the expected impact of RDR in the UK and the potential of the international market".

Platform One's Chairman, Charles Cary-Elwes, said: "We are very pleased to have Forester MacLean as a shareholder. It recognises the company's unique position in the market and their investment continues to confirm the potential of our platform business. We are also delighted to welcome Michael Burt to the Board of Platform One and thereby to have the benefit of his successful entrepreneurial skills and business experience available to the company".

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Notes for Editors:

- ◆ Platform One has been established by a group of financial services companies with a shared vision of establishing a premium Wrap service. The founding partners are The WAY Group, London & Colonial, Ward Goodman Financial Services, Section 615 Ltd, European Pensions Management and Cheviot Asset Management.
- ◆ The Platform One service is aimed at top tier adviser firms and multiple Family Offices. It provides high levels of service that supports the adviser firm's premium clients. Its philosophy is to serve and protect for the adviser their most valued clients which normally account for the majority of the firm's income.
- ◆ Platform One provides a "whole of market" platform that also offers access to products and services that are suitable for high net worth clients and specialist international pensions. These typically include IHT planning and specialist trusts, flexible pension provision and open annuities, offshore pensions investments, asset protection and bespoke discretionary management. The Platform One service provides these specialist products and services in addition to a wide range of other open architecture products available in the market.
- ◆ Platform one offers both a UK and an International service that enables advisers with clients based overseas or UK clients with overseas investments such as QROPS to be served by a single platform. For adviser firms based overseas with expat and international clients, the platform provides an English language support service.
- ◆ A key feature of Platform One is the facilities it provides to record and maintain "non-custody" assets which are usually held by high net worth clients. These investments often represent a significant proportion of such clients' wealth and will typically include UK and international property, yachts, jewellery, equine bloodstock and specialist investments in LLPs, EIS and unquoted shares.
- ◆ Platform One Limited is authorised by the FSA as a platform provider under MiFID and passported throughout the EEA.