

Capital Platforms
Offshore Investment Platform
Online support for your platform account









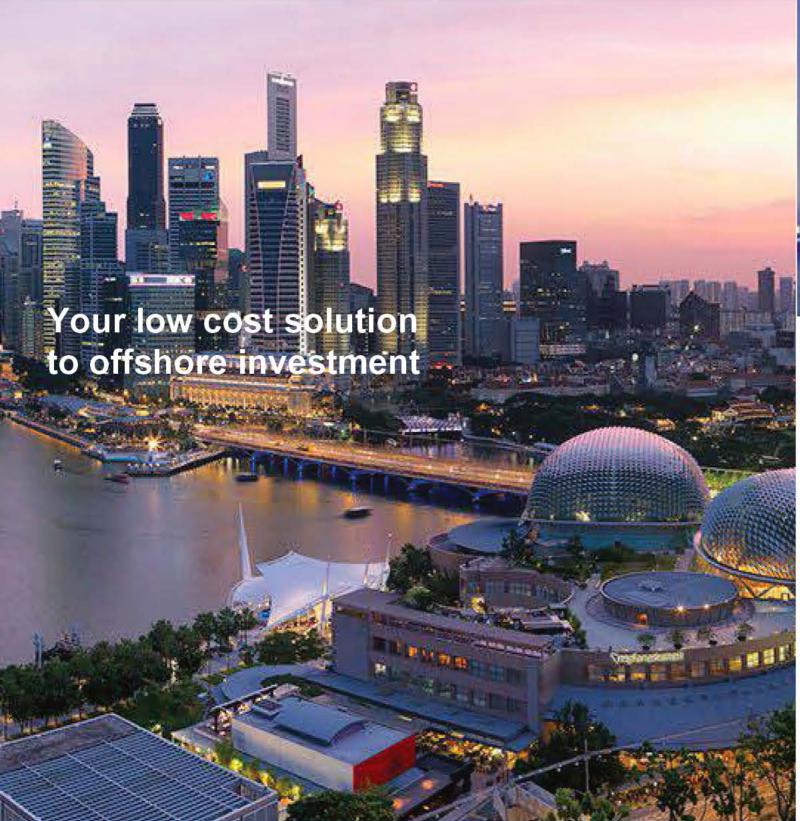












A modern approach to Financial Management



Introduction

The Fund Investment Platform provides a solution offering access to an unrivalled choice of offshore mutual funds, pension schemes, tax planning and other structured financial products.

Full online account access allows for greater flexibility, control and peace of mind. The Capital Investment Platform is able to provide a combination of traditional investment products which can also be wrapped and supported by:

- Life Company Personal Portfolio Bonds
- QROPS Qualifying Recognised Overseas Pension Scheme
- QNUPS Qualifying Non UK Pension Scheme
- Trusts
- · SIPPs

Key Benefits

- Over 7,000 Mutual Funds from 200 leading Fund Houses
- Low cost, flexiable charging structure
- Exclusive Structured Products
- Stand-Alone Investments
- Supported by major Life Companies
- QROPS Friendly
- Retirement Planning
- A Multi-Currency Account (USD, EUR, GBP, CHF, JPY, HKD, AUD, NZD, SGD)
- Access to equities & ETFs (Exchange Traded Fund)
- Investment protection with automated alerts & stop losses





Over 7,000 funds from 200 leading fund houses

Unrivalled Investment Products

Full Compatibility with Policies from Leading Personal Portfolio Bond (PPB) Providers.

- Friends Provident International
- Reserve Bond and Policy Reporting
- Royal London 360 PIMS
- Royal Skandia International
- EIB/ERB & CIB/CRB (Reporting only)

Mutual Funds

7,000 Offshore Mutual Funds from more than 200 Fund Houses

ABERDEEN
ABN AMRO
AMERICAN EXPRESS
AXA
BARINGS
BLACKROCK
BNP PARIBAS
CREDIT AGRICOLE

CREDIT SUISSE
DEXIA
DWS-DEUTSCHE
EATON VANCE
FIDELITY
FIRST STATE
FORTIS
JULIUS BAER

GOLDMAN SACHS
HENDERSON
HSBC
ING BARINGS
INVESCO
JP MORGAN
JUPITER
UBS

M&G

MORGAN STANLEY

PICTET

PUTNAM

SCHRODER

SOCIETE GENERALE

TEMPLETON

Compatible with QROPS/SIPPS

- Ability to link your UK overseas pension plans to the platform.
- View and manage your portfolio online.
- Huge range of providers: Sovereign, Boal & Co, Brooklands, Concept, Stadia and many more











Exclusive Products

Structured Products with Global Leading Banks

Our platform can take advantage of large client volumes and distribution agreements with leading banks such as: Deutshe Bank, Morgan Stanley, Nomura, Citi Bank and Royal Bank of Scotland.





NOMURA





A Structured product represents a closed end investment which may include a combination of the following features:

- Capital Guarantees
- Guaranteed minimum returns
- Protection Barriers
- Guaranteed Incomes



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Client Benefits

- User Friendly
- Flexibility- covers all products
- Automated Continuous Reporting
- Offshore Custodian Account
- Open Architecture
- Value lower trading fees
- Benchmarked Fund Information
- Multi-Currency Account





Daily Feed

Providing Independent, Unbiased Financial Guidance

Morningstar is established as a global leading independent investment research provider. With operations in over 20 countries, Morningstar currently tracks more than 100,000 worldwide investment vehicles every day.

Morningstar Rating System

The Morningstar rating system is derived from the relationship between fund performance and fund risk. This can be used to directly compare funds within respective categories.

Offshore Structure

All clients receive an offshore trading account located within Luxembourg, a leading provider of offshore custodian accounts.

Luxembourg is Europe's number one investment centre and the world's leading hub for global fund distribution.

With strong regulatory and investor protection frameworks, Luxembourg has strengthened its position as one of the world's most attractive investment fund centres.

Luxembourg offers the strongest investor protection schemes in Europe, ensuring client holdings are as safe and secure as possible

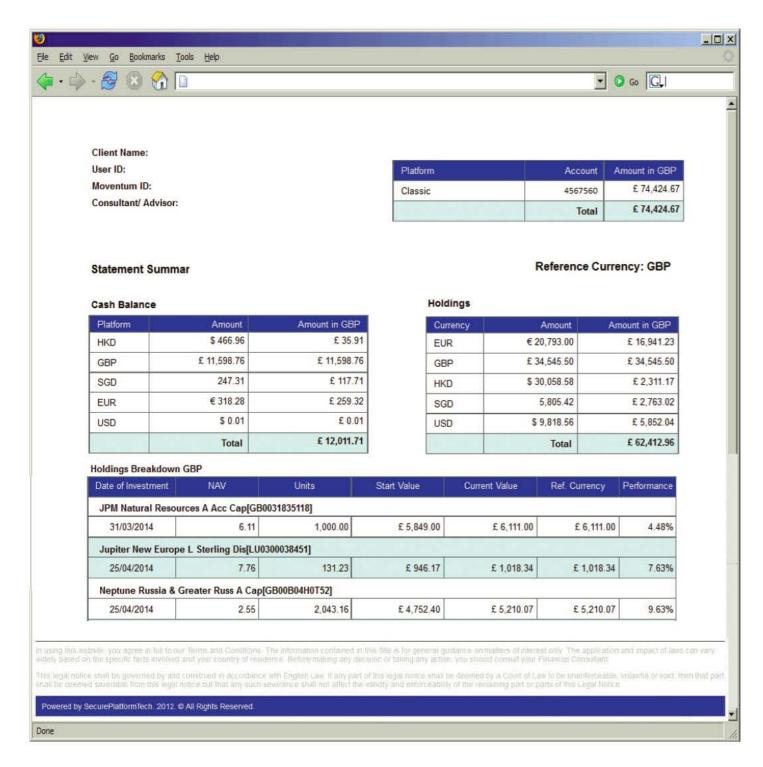


Client Valuations

Valuations can be accessed at any time at the push of a button. The statement displays a full breakdown of assets, cash position and a summary of holdings with in the portfolio.

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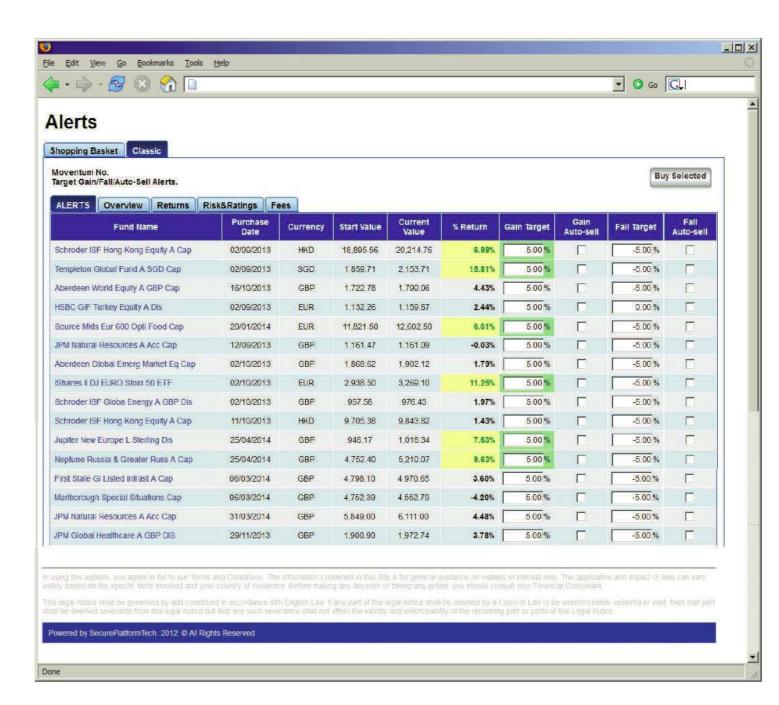
Example Valuations



Automated Monitoring - Protecting your investments

Clients have 24/7 access to their account where they can view live valuations. All Assets are monitored by My Alerts, providing automated notifications when pre-set gain and fall % targets have been met.

My Alerts Example



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