

Introducing you to
Quilter's platform

Quilter



Suitable for retail clients

Money needs a plan. You're in the right place

Your money needs direction for it to work harder. That's why we think having a plan matters.

We've been empowering customers like you to achieve their financial goals since 1979. Quilter is one of the UK's leading wealth managers. We're here to build brighter futures, helping you and your family live the life you want. Our award-winning investment platform helps you and your adviser easily put your financial plan into action, giving you the tax-efficient products, flexible options, and secure technology you need to make your money work harder.

We pride ourselves on giving you:

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| <p>A safe and secure home for your investments</p> | <p>Outstanding value for your investments</p> | <p>Quicker and easier access to your money</p> |
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Working with your financial adviser

We believe in the power of professional advice. That's why we work with financial advisers like yours, so that you can enjoy the benefits of a tailored service powered by our market-leading platform.

The value of investments can fall as well as rise. You might get back less than you invested.




Reviews 11,839 • Excellent
 4.5
Rated Excellent as at 2 December 2025


NOVEMBER 2025
Which?
Recommended Provider
PENSION DRAWDOWNS



2026
EXPERT RATED

Over
500,000*
people have chosen to invest with us.

We're trusted to look after over
£104bn*
on behalf of our customers.

* as at 31 December 2025.



Giving you a safe and secure home for your investments

Our number one priority is the security of your investments.

✓ As one of the UK's leading investment providers, we continually make **significant investments in the security of our platform**, so you can have peace of mind that your money is in safe hands.

✓ Our online Customer Centre is a **safe home for all your documents**, so you can store them securely and access them anytime, anywhere.

✓ We provide valuable guidance on how to protect your money and **stay safe online**, so that you can invest confidently.





Giving you outstanding value for your investments

At Quilter, we make sure your financial adviser has access to everything they need so that you can enjoy great value on your investments.

✓ We offer a **suite of tax efficient products, and access to cash savings accounts**, so that your financial adviser can choose a strategy that will help you meet your financial goals.

✓ We provide you with a generous discount on our platform charge, when you invest through a financial adviser who is part of Quilter Financial Planning.

✓ We are pleased to provide you and members of your family with our **best-in-class family discount**, so that you can enjoy better value together.



Extra value for you and your family

Did you know you can drive down the cost of investing with our multi-family member discount?

With Family Linking we add together all family investments, and cash savings, to calculate a reduced charge for all family members.

How Family Linking works

- ▶ Up to four generations can be linked.
- ▶ You need to be with the same financial adviser firm.
- ▶ You could all benefit from a reduced platform charge.

Find out how much you and your family could save by speaking to your financial adviser about Family Linking.





Giving you quick and easy access to your money

At Quilter, we'll give you access to our market-leading platform so that you have:

- everything you need to **see how your investments are performing**, at your fingertips
- freedom to choose when to receive your money from the 1st to the 28th of each month, so that you can benefit from an **income schedule that works around you**
- the power to **request withdrawals and manage your cash online** so that you and your financial adviser can enjoy being free from paperwork and complete your transactions faster.



Welcome to your customer centre

When you become a new Quilter customer, the first thing you'll want to do is activate your online account. Our online Customer Centre and Quilter mobile app are now used by over 340,000 customers, who love the fact that they can:

- ▶ see how their money is performing
- ▶ view all their cash savings and investments in one place
- ▶ go paperless to reduce unnecessary admin.

Scan QR code to download our mobile app:



Scan me

Activate your account:



quilter.com/login



Having online access has helped me stay organised and it's been great to reduce the amount of paperwork I receive. Activating was easy, and using my account is just like using online banking.

Janet, 75, Quilter Customer, Salisbury

Your investment may fall or rise in value
and you may not get back what you put in.

quilter.com

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Approver: Quilter, February 2026.