

Parmenion Platform

Target Market Statement



For professional use only

The Parmenion platform is an online technology system designed to help you and your clients manage and monitor their investments in a safe and secure environment.

It offers:



A range of **investment solutions** aiming to provide capital growth, income, or a combination of both



High quality **customer service** and support



A range of **product wrappers** including a SIPP, ISA and General Investment Account



Flexible **payment and withdrawal** methods



Secure online technology that allows you manage and report on your clients' investments



Clear, **transparent pricing**



Optional **secure online access** that allows clients to view their own investments

The platform is designed to deliver these outcomes for advised clients:



Clients can invest in a **range of investment solutions** to meet their financial goals



Clients can access the **customer support** they need when required



Clients can access a **range of product wrappers** to meet their financial goals



Clients can make **payments and transfers** in and out of their account efficiently



Clients can view their account and **access fund information** easily and quickly



Clients can **understand the charges** they are paying

Investment range

The Parmenion Platform offers a range of investment solutions managed by either an adviser or a professional discretionary fund manager (including our own Parmenion investment managers). The solution manager has access to a wide range of collective investment schemes, e.g. unit trust and OEICs and ETFs, from which to build their solutions.

The platform may be suitable for:

- UK retail clients aged 18 or over (apart from junior products) wanting their investments to be managed by a financial adviser
- Clients willing to invest for the medium to long-term (usually five years or more).
- Clients willing to accept the risk of their investments falling in value in the hope they achieve a better return than cash over time
- Clients who typically have lump sums to invest and /or existing investments to transfer, in addition to any regular contributions
- Clients wanting to access their investments flexibly now, and in the future
- Clients wanting to invest in one or more product wrappers in one place
- Clients wanting to invest in a portfolio of retail assets

The platform may not be suitable for:

- Clients who want to manage their investments themselves without a financial adviser
- Clients wanting to invest for a short-term period (typically less than five years)
- Clients not willing to accept the risk of receiving less than they invest, or just wanting a cash-based account
- Clients only wanting to make small regular contributions
- Clients who want individual off-platform product wrappers
- Clients wanting to invest in a single asset or more complex asset types

Vulnerable customers



Any client can become vulnerable on a temporary or permanent basis. Parmenion staff are trained to assist advisers, vulnerable customers & their representatives. So vulnerable customers will receive the same high level of service as other clients.

Parmenion

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