

A platform built around advisers

At FundsNetwork, we've spent 20 years constantly striving to keep our products and services ahead of the game, with the help of feedback from advisory firms like yours. Since the launch of our low-cost pension wrapper in 2013, we've been making incremental improvements to our platform, so that we always provide the features and support you need and deserve. Here you can see some of the improvements we've made so far, building more flexibility and consistency across our products and services.



Online re-registration of assets and ISA transfers

A paperless straight-through process that minimises errors and integrates with TEX for requesting assets from other providers.



Introduction of Cash Accounts

Cash Management Accounts and Product Cash Accounts, within all our products.

Allowing clients to pay into investments more easily and benefit from tax efficiency of different wrappers, and can be used to facilitate the payment of fees so client investments remain untouched.



Bed & ISA enhancements

Increased features, including adding an 'oversell' amount to the total required to invest in an ISA, to allow for market movement and charges, and the ability to 'mirror' investments sold within an Investment Account to buy the same in an ISA.



FundsNetwork Pension moved to our new product administration system

FundsNetwork Pension moved to the same system as ISAs and Investment Accounts, enabling improvements such as increased options for Regular Savings Plans, more collection dates and the ability to select an end date for regular initial fees, and an extended range of exchange-traded investments.



New advised client website

A simpler way for clients to access and view their investments across laptops, mobile and tablets.



New advisory website

A simple and helpful website, including an action-orientated 'Help & Support' section.



Adapting to regulatory changes / accommodating regulatory changes

Following MiFID II regulation, more detailed statements were introduced, including annual costs and charges summaries.



Pension Summary report

A new feature introduced is a Pension Summary report, providing a detailed overview of clients' pension accounts.



Integration of fund tools

Helpful online tools, including the Investment Finder, which makes it easy to search and research options. And when finding the right choice for clients, there's also a tool that charts and compares funds.



FundsNetwork Pension launched

A low-cost pension wrapper with a service fee of 0.25% and investor fee of £45 per year (if applicable*) with flexibility built in, that's continually updated. Features include no transaction charges on drawdown and pension transfers, and a broader range of assets available, including investment trusts, exchange-traded funds and company shares.

* only payable if not already being paid on another account



New Model Portfolio Centre launched

An easy way to set up and apply model portfolios to client accounts, including fund availability, rebalancing enhancements and TER calculations. Portfolios can include up to 30 investment options.



Share dealing

In line with demand, the range of Investment Trusts, ETPs, ETFs and shares available continues to grow. Today, together with mutual funds, there are over 5,000 investment options available.



New client reports

On the back of feedback from advisory firms and the enhancements we are making to our service, we have introduced new 'Client reporting' with the benefits and features built around the feedback we have received.

2013

2020

Still to come in 2020/21 - enhanced DFM capabilities and phased drawdown.