

INVESTMENT & SAVINGS

MAKING INVESTING IN STOCKS AND SHARES IN THE WORKPLACE SIMPLE

SCHEME OVERVIEW

Our Investment & Savings benefit enables employers to offer their employees the opportunity to buy an investment ISA through the workplace. Making investing easy, with simple comparison tables covering over 90 investment providers, and automatic monitoring after your employees invest.

Offering this benefit can help your employees invest their money in a smart way which can help employees feel more in control of their finances and their future. It provides a way to save for things like buying a home, starting a family or ticking things off their bucket list.

KEY FEATURES

- ▶ Easy product comparison, selection and checkout – like shopping online
- ▶ Reduced costs
- ▶ Member portal – shows current balance, performance
- ▶ A choice of ready made risk appropriate portfolios making investing simple and straightforward
- ▶ A full range of funds for the more experienced investor
- ▶ Ongoing monitoring to help buyers keep their investments on track



HOW DOES IT WORK?

Investment products are traditionally complicated and can put people off if they don't have the knowledge, experience or access to a financial advisor.

Research conducted by the Money Advice Service (MAS) showed that more than 16 million people have less than £100 in a savings account.

Working with our partners we look to help people get better outcomes from their savings and investments and help you as the employer try and improve financial wellbeing in the workplace.

People are used to buying products online in a consumer-friendly way. Our Investment & Savings scheme is designed to make a traditionally complicated product more accessible. With an easy to use product comparison feature, it makes viewing and selecting products a much more engaging experience.

Employees can invest as little as £50 a month, or a lump sum of £100, and by signing up through our platform will have access to preferential pricing when using the service.

BENEFITS FOR EMPLOYERS

- ▶ Enhance your financial strategy
- ▶ No cost to you
- ▶ Giving employees the chance to make more of their money
- ▶ Helping employees take control

BENEFITS FOR EMPLOYEES

- ▶ Free to switch investments
- ▶ Simple and transparent charges
- ▶ Significant discount on charges
- ▶ Free monitoring service for investments



Talk to a member of our team today

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