TrinityBridge

Direct Services

	Your previous service	Services available to you	
	Financial Planning Service	**Direct Investment Service**	**Online Self-Directed Service***
Service summary	A fully advised service, combining our capabilities of financial planning, investment management and efficient administration	Best suited for existing clients with straight-forward portfolios and non-complex personal circumstances, whose investments no longer require on-going financial advice	A fully online service for those who prefer a more do-it-yourself approach and are comfortable making their own investment decisions
Dedicated financial planner	Yes Face to face, telephone or online	No Access to one-off advice as required (fees apply)	No Access to one-off advice as required (fees apply)
Annual review of finances	Yes	No	No
Quarterly investment reports	Yes	Yes	Yes Plus ability to generate reports online at any time
Annual tax statements	Yes	Yes	Yes
Costs	Annual Professional Advice and Service fee of between 0.4% and 0.75% based on the value of the investments under review** Platform fee starting at 0.25%, reducing based on the amount invested	Platform fee starting at 0.25%, reducing based on the amount invested	Platform fee starting at 0.25%, reducing based on the amount invested
Online access to view portfolio and documents	Yes, upon request	Yes, upon request	Yes
Ability to transact and trade online	No	No	Yes
Management of Third party holdings	Third party transactions facilitated on your behalf	No	No
Cash management	Management of cash balances for income and fee payments	No, self-managed	Access to manage online
Automatic annual ISA subscription	Yes	No	No
Pension drawdown	Yes	Yes, self-managed	Yes, self-managed

Information correct as at September 2024.
*To check if you are eligible for this service, please contact the Investor Support Team.
** Subject to a minimum of £2,000 per annum, or £1,500 per annum if advice is via our Remote Advice Service.

Our Terms and Conditions are available online, please visit trinitybridge.com/general-terms-and-conditions

Mobile app to view portfolio and documents	Yes (Online access required to use the app)	Yes (Online access required to use the app)	Yes
Dedicated support team	Yes 9am-5pm Monday to Friday (excluding public holidays)	Yes 8am-6pm, Monday to Friday (excluding public holidays)	Yes 8am-6pm, Monday to Friday (excluding public holidays)
Regular research articles and insights	Yes	Yes	Yes
Wealth Matters Newsletter	Yes	Yes (where you have opted in to receive marketing materials)	Yes (where you have opted in to receive marketing materials)

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