



Söderberg  
& Partners

Wealth  
Management

# Client Brochure

# Working today for a better tomorrow

Söderberg & Partners is the leading non-bank financial adviser in Scandinavia. We are combining our long history in the Nordics with expertise in the UK platform space, to become the best platform partner to Independent Financial Advisers in the UK. By providing a digital only, efficient, and paperless platform at a fair price and with an excellent service offering, we streamline the experience for you and your adviser.

## **Integrated**

Our platform is built on modern API-architecture, allowing us to seamlessly add new elements and 3rd party solutions that your adviser can use for your benefit.

## **Efficient**

With us you invest efficiently since we offer straight through processing in a fully digital solution.

## **Paperless**

No more physical documents and wet signatures with our paperless user journeys. Without manual processes and burdensome administration, your adviser has more time to focus on what is truly important - you.

## **Flexible**

We offer a wide selection of assets and various ways for your adviser to group, administer and manage your investments.

## **Cost effective**

Efficient, digital processing allows us to reduce costs. We offer various ways for you to benefit from these efficiencies such as linking your investments with family members to receive lower charge.

## **Secure**

Your money is safe with us. Withdrawals can only be made to an independently verified bank account belonging to you personally.

We are part of the Financial Services Compensation Scheme (FSCS).\*

## **Here for you**

The foundation of our offering is, and always will be, personal service. Your first point of contact is your trusted financial adviser, but our Service Centre is always ready to assist you if needed.

\* visit [www.fscs.org.uk](http://www.fscs.org.uk) for more information

# Financial advice



# Technology

We make sure your financial adviser has everything they need to help you meet your financial goals. On our platform you can access a suite of tax efficient wrappers suited to your individual needs, and an extensive and flexible asset universe to go with it. Everything in a digital first, paperless experience.

At Söderberg & Partners Wealth Management we believe in the power of professional financial advice, with a personal touch. We also believe that technological advancements can enhance almost every aspect of the advice process - from analysis and preparation, to reporting and trading. We are committed to delivering a platform that combines solid market experience with the best use of new tech.

# Available products



**GIA**  
**ISA & JISA**  
**Pension**  
**3rd party products**

# Asset universe



**ETFs**  
**Funds**  
**Investment trusts**



Assets on platform	Annual charge
0-£100K	0.25%
£100-250K	0.20%
£250-500K	0.15%
£500K-1m	0.10%
£1m+	0.05%

Other charges	Fee
GIA	£ 0
ISA	£ 0
JISA	£ 0
SIPP accumulation fee	0.05% (£12 min and £48 max per year) + VAT
SIPP decumulation fee	0.10% (£12 and £48 max per year) + VAT
Exchange Traded Instruments	0.05% per trade

***"First class technology solutions have been key to the success of Söderberg & Partners in Sweden, and we are delighted to bring this approach to the UK. Our overall aim is to reduce the cost of advice and support advisers in delivering excellent service to end clients."***

**Nick Raine**

Chief Executive Officer



# Service Excellence

Service is at the heart of everything we do. We are committed to delivering a service offering that does not only meet, but exceed, the expectations of you and your adviser.



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This brochure is not a marketing communication and is not intended as a recommendation to use any of the features mentioned. All customers wishing to use the SPWM platform must have a regulated financial adviser and only invest following a personal recommendation from that adviser. Clients should note the value of investment can fall as well as rise and they may get back less than they put in.

