

10 good reasons to use Cofunds

Cofunds is the UK's largest independent investment platform offering a range of products and services and administration services for you and your clients.

1. Market leading capability

The UK's largest investment platform with £89.3bn assets under administration (as at 30 June 2017).

2. Ownership

Cofunds is wholly owned by Aegon, the international pensions, life insurance and asset management business.

3. Independent platform services

Cofunds is impartial and does not offer financial advice or manage any of its own funds.

4. Award winning platform

Cofunds commitment to service excellence has been widely recognised across the industry.

5. Administrative expertise

Core to Cofunds is our proven, scalable administrative systems and infrastructure. Cofunds have developed integration services to back office systems bringing you further operational efficiencies within your business.

6. Consolidation expertise

Cofunds provides a truly holistic view of your clients' investments. This enables you to identify business opportunities to strengthen your sales revenue and reduce your operational overheads. Having proven expertise in consolidating collective investments and ISAs, Cofunds also offers a robust platform for consolidating your clients' pensions.

7. Extensive range of products and services

Choose from over 3,400 funds from over 210 fund managers (as at 30 June 2017) as well as a range of products including; pensions, Investment Funds, ISAs and bonds from a variety of product providers. You'll find it easy to build a suitable portfolio for all types of client.

Our online portfolio planning tools and Research Centre enable you to research funds quickly and easily, with the option to use the researched fund panel or one of the four model portfolios developed by Morningstar OBSR.

8. Training and support

With specially designed training workshops and conferences available online and face to face across the UK, Cofunds keeps you up-to-date with current debates, industry and market trends.

9. Flexible fees

Cofunds administers a range of flexible fee models to suit your business. Cofunds also provides you with access to a suite of management information that enables you to reconcile your fee payments.

10. Demonstrating your value

Cofunds offers value added services to enhance your business proposition. We can facilitate branded client statements, online client portfolio access and branded microsites.

How to contact us

Click: www.cofunds.co.uk

Email: businesssupport@cofunds.co.uk

Call: 0345 604 4001

If you're contacting us by email please remember not to send any personal, financial or banking information because email is not a secure method of communication. Telephone lines are open Monday to Friday 9am to 5pm. Calls may be recorded for training and quality purposes. Call charges will vary.