

Who we are

We're one of the UK's largest wealth management platform providers, and part of a company with a heritage dating back nearly 200 years. And while times have changed, we remain firmly committed to helping you plan, save and invest for the future.

A platform provider you can depend on

Trust and reliability are key when it comes to looking after your money. We're proud to be the only platform provider awarded an 'A' rating by AKG for eight consecutive years. This independent recognition of our financial strength means you can rest assured your money is in safe hands.

Proven growth and scalability

Our Wrap platform has a demonstrable track record in scalability. Since launch in 2006, growth has been rapid. Aberdeen platform solutions are currently used by over 3,000 adviser firms to support over 401,000 individual customers.

Continual investment and development

As a result of our growth, we can continually invest in our business allowing us to develop key features and functionality, and in turn improve the service your adviser can offer you. We have a strong commitment to our security - we continue to invest in robust security and controls, designed to protect your assets and information.

Strength in numbers



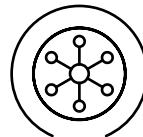
£77.0bn

We manage a total of **£77.0bn¹** of assets on our platforms on behalf of over **401,000** customers.



3,000

3,000* financial advice firms work with us, about half of the total number of firms in the UK.



95%

Customer satisfaction score.
YTD as at December 2025.

¹ across Wrap, Elevate and Fundzone as at 31 December 2025.

"At the heart of our business is an unwavering commitment to provide best in class solutions that empower your adviser to help you achieve your financial goals.

We work in partnership with your adviser, equipping them with the technology, tools and investment options they need to manage a financial plan that's tailored to you and offers you a more personalised service - all powered by our award-winning platform.

And as part of a global company, we offer scale and reliability - so by entrusting us with your money, we can put our strength to work for you. We're delighted to have you on board as a customer - when it comes to your financial future, we're here to support you and your adviser every step of the way."

Message from Noel Butwell
CEO Aberdeen Adviser



Helping your adviser manage your investments effectively

Our platform is designed to make it easy for your adviser to adjust your portfolio and respond to changes in the market quickly.

We provide the technology and tools to help your adviser manage your investments effectively.

Our platform allows your adviser to:

- select the products you need and set up your financial plan
- access a wide range of investment options to help meet your financial goals
- switch between investments
- carry out transfers to bring your assets together in one place
- access tools to support tax and inheritance planning
- generate reports for reviewing your plan with you.

All your savings and investments in one place

Wrap can transform the way your adviser manages your money. It offers access to a full range of products, from pensions to ISAs, as well as a flexible range of investment options to match your investment goals and your risk appetite.

With Aberdeen Wrap you can also access a range of cash deposit accounts that offer competitive cash interest rates from a range of banks and building societies. These can be held within the Personal Portfolio and, as they are fully integrated on the platform, your adviser can manage cash alongside your other investments.

Pre-funding – invest without undue delays

We pre-fund new investments, fund switches, tax relief and rebalancing with our money while your funds are clearing, so your money is invested faster and for longer.

Your portfolio at a glance

You can access a secure online client portal so you can check in on your portfolio at any time. It's easy to use and you can view up-to-date valuations, product details and documents, which you can access on your desktop, tablet or mobile. Your adviser can set up your access to the client portal. You can also ask your adviser about the 'interested party' functionality, which allows you to view your family accounts all in one place.

Offering our best ever value

We offer clear and competitive pricing so you can see exactly what you're paying for – and you can benefit from greater discounts with Wrap family linking and our innovative Drawdown Price Lock:

Your family wealth

Wrap family linking can help you access greater discounts by letting family members link their accounts for charges purposes. Each person can then benefit from the tiered charge based on the combined value of the assets held on Wrap across your family group.

Our Wrap Junior ISA (JISA) is also available to existing Wrap customers, offering a tax efficient way to save and invest for a child. There's no platform charge on the JISA account until the child turns 18. If family linking is in place, the Junior ISA assets will be automatically linked to the main account (as per eligibility criteria).

Lock in the most competitive charge

And with our Drawdown Price Lock, you can lock in your platform charge tier when assets are at their highest. This means your SIPP charge tier will not increase as you take money out of your pension pot. The price locked in is based on pension and non-pension platform eligible assets, including assets held within a family linking arrangement.

Highly-rated solutions

We've paved the way in providing best in class products and services. Our commitment is reflected in our Gold Service rating and the 5-Star Ratings awarded by Defaqto for our Wrap Platform. The platform is also rated A by AKG, further demonstrating its strength and reliability.



- 5 Star Rating – 2015-2026



- Gold Service Rating – 2026



- AKG Rating: 'A' Superior Rating 2018-2025

More on our website

Visit www.aberdeenpersonal.com/en-gb/platform to find out more.

The value of investments can go down as well as up and may be worth less than originally invested.

Aberdeen Platform Limited, provider of the Wrap platform and Wrap Personal Portfolio, is registered in Scotland (SC180203) at 1 George Street, Edinburgh EH2 2LL and authorised and regulated by the Financial Conduct Authority.

Aberdeen Platform Limited is part of the Aberdeen Group, which comprises Aberdeen Group plc and its subsidiaries.

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