

Selecting the right platform solution to support your business can be a complex and time-consuming process.

That's why we've produced this comprehensive, easy-to-follow due diligence guide to our Elevate platform solution.

This guide takes you through the key due diligence questions you need to ask and the answers you need to know.

The information here will help to enable you to select the right platform that will not only add more value to your business but more value to your client relationships too.

So take a look through this due diligence guide to find out how Elevate can support you to deliver quality advice to your clients.



1. The provider

As an adviser, you need to be confident the platforms you use can support your business. Both today and in the future.

Our commitment and our experience should give you the reassurance you need.

We operate a service model that puts your clients at the heart of everything we do.



2. Corporate Sustainability

We aim to lead by example, striving for the same high standards that we expect from investee companies. Our commitment across Aberdeen Group is to be transparent in our disclosure, ambitious in our targets, and inclusive in our actions.



3. Terms and conditions

Make sure you have a good read of the terms and conditions. This is essential as these are binding agreements between the platform and both you and your client.

You need to make sure you understand the clauses so you understand our respective responsibilities.



4. Charges

Platforms should be transparent,
flexible and competitive.

We pride ourselves on a clear and simple pricing structure. For clients, understanding the world of investments can be difficult. Which is why we've made our platform pricing easier, with clearly defined charging tiers based upon the amount your client has invested in Elevate.



5. Products

Understanding a platform's proposition helps you establish whether it's sufficient for your clients' needs.

We offer a wide range of products. Since they're available through Elevate, you can review and manage them all in one place.



6. Investment solutions

We understand quality, choice and cost are important factors when selecting investments for your clients.

That's why Elevate offers a comprehensive range of funds including an extensive collection of discounted share classes, so Elevate can help you meet the investment needs of your clients.

Elevate offers a wide selection of assets to choose from. With such a diverse range, you can select investments to suit a wide variety of clients. Whatever their attitude to risk or investment goals, you'll also be able to build a portfolio to help match their requirements.



7. Functionality

Functionality plays a big part in your platform choice. Technology in the platform market has improved enormously in recent years.

The technology we've used to develop the platform delivers a variety of features that aim to make investing simpler, from transparent charging to two-way integration.



8. Access

Think about when you need to access the platform.

Does it need to be out of office hours or at the weekend? Are you clear when the platform is available?

We aim to give you the 24-hour access you need.

Plus, the day-to-day management of accessibility needs to suit not only you, of course, but also your clients.



9. Tools and reporting

Take some time to consider what tools you want to use on your platform.

What do you think will make your life easier?

Elevate offers a range of tools and numerous useful resources to help save time, and keep you and your clients informed.

Tools to help you research, shape and support investment decisions.

Everything from a risk assessment tool to portfolio and review tools to help with tax-efficient withdrawal.



10. Support services

When you're working on the platform, does it deliver added value?

Elevate is intuitive and easy to use.

It was built to allow as much self-service as possible.

However, we realise there'll be times when you need additional help and support.

We're available to give this to you in a number of different ways.



