Aberdeen Fundzone – statement of target market

For UK adviser use only.

General description

Fundzone is an online investment platform that is designed to support advisers in the delivery of their advice (including financial planning, tax and investment management activities), to meet their customer's needs.

It provides advisers with access to different investment and savings products to help meet their customer's needs. These products include a Stocks and Shares Individual Savings Account, and Personal Portfolios. Each product may be subject to different tax rules and investment limits set by the government. The statements of target market for these products provide more information.

Fundzone is provided by Aberdeen Platform Limited, part of Aberdeen Group plc.

Vulnerable customers

Any customer could find themselves in vulnerable circumstances at any time. We will aim to ensure that vulnerable customers invested in a Fundzone account continue to receive the same fair treatment and outcomes as other customers.

Customer objectives

Customers who invest in a Fundzone account want:

- to invest flexibly without any minimum or maximum limits
- to invest over the medium to long term
- either capital growth or income (or a combination of both).

Tax and legislation may change. The information here is based on our understanding as of May 2025. Customer circumstances will have an impact on what tax they pay.

Who is it suitable for?

A Fundzone account might suit customers who:

- want to invest for capital growth or income (or a combination of both), and have the ability to move money between assets as needed to meet these objectives
- want, and are able, to invest over the medium to long term (five years or more)
- are a UK resident
- are aged 18 or over.

Fundzone is designed to be used with affluent and high net worth advised customers. Typically, those who have complex savings, investment, and financial planning needs, require regular advice, and need a variety of solutions to produce good outcomes. It is suitable for investors with all levels of knowledge on an advised basis, and who are comfortable that their investment may rise and fall in value over time and understand there is a risk that they may get back less than they paid in.

Who is it not suitable for?

Advisers should not open a Fundzone account for their customers if they:

- require access to their investment within the short to medium term (less than five years)
- require a targeted rate of return
- are under the age of 18
- are non-UK residents
- are a U.S Persons
- are a Russian/Belarussian National/Dual National.

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Investment choice and range

Fundzone provides advisers customers with access to cash, as well as a wide range of investment options via the following tax wrappers:

- Stocks and Shares ISA
- Personal Portfolios.

It is suitable for investors with a low through to high risk tolerance depending on the investment/ portfolio selected. The value of investments can go down as well as up and could be worth less than originally invested.

Distribution channel

Fundzone is designed to facilitate medium to long term financial planning on an advised basis. If the adviser's relationship with a customer comes to an end, we will continue to support these customers on an execution only basis, with appropriate access to investments and ongoing support (from Aberdeen Group plc).

For more information visit aberdeenadviser.com

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