



# Wealth Management

Wealth management and wrap account solutions aimed at the retail, advised and high net worth markets

The holistic management of wealth from a single point has been a concept previously in the domain of the large private client banks, we are seeing more and more these services become more 'retail' and mass market in nature with the mass retail wealth management and the evolution of the 'wrap account'.

We can provide administrative solutions that support the full range of wealth products, ranging from wrap accounts, supermarkets through to full wealth management solutions using proven record keeping technologies, that allow for multiple types of financial instruments, from mutual funds, to equities, gilts, fixed interest, exchange traded funds and cash combined with a wide array of tax wrappers, from ISAs to SIPPs.

Our tools can provide flexible portfolio management of individuals and groups of investors, with STP integration with the market for trading, and data feeds allowing comprehensive analysis.

The provision of internet front ends for investors, advisors and portfolio managers allowing trading and enquiry on balances, market sectors and detailed transactional information.

In addition to the provision of full wrap and wealth management solutions we can also provide component products such as an ISA allowing the whole 'allowable market' in ISA product to distributors looking for an off the shelf and independent product offering.

The combination of a wide and flexible product offering, along with our experience in providing leading customer servicing, flexible and high quality customer communications and comprehensive front end technologies for investors and advisors means IFDS is a serious contender in the wealth and wrap market.

## at a glance

- Wide range of financial instruments supported
- Extensive tax wrapper support
- Multiple service and product model options
- Direct customer and advisor based solutions
- Proven technology solution

