

Your enhanced experience

We've made a multi-million investment in the platform since 2013

A lot has changed since 2013. Some of it was planned – while some of it, like the Covid-19 pandemic, came out of the blue. But our commitment to always strive to be better for advisers, means that we have nearly a decade of platform enhancements to look back on, from introducing digital signatures to evolving alongside ever-changing regulations. And we aren't stopping here. We're proud to put you at the heart of everything we do at Fidelity FundsNetwork – which means being ready to keep adapting in the years to come.

COMING SOON



Pension Phased Drawdown

This is an essential upgrade, to make sure we provide a full accumulation and decumulation pension offering. Offering greater flexibility, it means clients can leave money in a pension wrapper for longer.



A new partner

We're excited to announce that we've partnered with a fintech company that focuses on robust financial planning software. With that in mind, we hope to add more features soon, which will deliver a best-in-class planning solution for you and your teams to use.



ESG tool

As more and more clients are asking about solutions that take into account Environmental, Social and Governance (ESG) factors, we'll soon be making available a tool to help you identify and select the right investments for your clients.



Origo Integration Hub

We have joined the Origo Integration Hub, which will soon allow us to work with different back-office providers, to help you spend less time on admin by improving the efficiency and speed of straight-through processing.

2021



API Technology deliveries

Through our API (Application Programming Interface) capabilities, it's now possible to create and control personalised screens, instead of using standard 'white labelled' web screens. This gives you greater control over the customer experience.



DFM enhancements and reporting capabilities

We've introduced split fees, and with industry changes we can now allow fees to be set up with or without VAT. We've also improved reporting, and a new 10% depreciation reporting service will shortly be introduced.



Cybersecurity

We've bolstered our online security measures, which we keep constantly under review to make sure your personal information and your clients' information is secure. From automatic log-off to being a member of the UK's fraud protection agency, Cifas, we do what we can to keep your data safe.



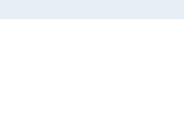
Transfer tracking and email notifications

Providing a greater sense of control, we optimised our tracking and notification services. As well as following new regulations, our new features include email notifications for individual case updates and a re-registration status report.



Pension Summary report

A new feature introduced is a Pension Summary report, providing a detailed overview of clients' pension accounts.



Adapting to regulatory changes/accommodating regulatory changes

Following MiFID II regulation, more detailed statements were introduced, including annual costs and charges summaries.



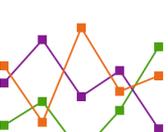
Digital signatures and upload & send

In response to the changing landscape due to the pandemic, we introduced digital signatures, as well as the ability to submit forms directly to the correct department. This new, efficient service helps to save time for all parties.



Share dealing

In line with demand, the range of Investment Trusts, ETPs, ETFs and shares available continues to grow. Today, together with mutual funds, there are over 5,500 investment options available.



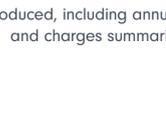
Bed & ISA enhancements

Increased features, including adding an 'oversell' amount to the total required to invest in an ISA, to allow for market movement and charges, and the ability to 'mirror' investments sold within an Investment Account to buy the same in an ISA.



ISA, Investment Account & Pension moved to our new product administration system

System Pension moved to the same system as ISAs and Investment Accounts, enabling improvements such as increased options for Regular Savings Plans, more collection dates, and the ability to select an end date for regular initial fees, and an extended range of exchange-traded investments.



Regular technical and regulatory updates

We introduced regular technical updates, including a paraplanner technical hub, pension training videos and insights, and guides across pensions, retirement and tax planning. We also launched compliance and regulatory updates, covering topics such as pension transfer advice rules, PROD and the Senior Managers and Certification Regime.



Introduction of Cash Accounts

Cash Management Accounts and Product Cash Accounts, within all our products. Allowing clients to pay into investments more easily and benefit from tax-efficiency of different wrappers, and can be used to facilitate the payment of fees, so client investments remain untouched.



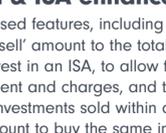
New advised client website

A simpler way for clients to access and view their investments across laptops, mobiles and tablets.



Online re-registration of assets and ISA transfers

A paperless straight-through process that minimises errors and integrates with TEX for requesting assets from other providers.



Integration of fund tools

Helpful online tools, including the Investment Finder, which makes it easy to search and research options. And when finding the right choice for clients, there's also a tool that charts and compares funds.



New Model Portfolio Centre launched

An easy way to set up and apply model portfolios to client accounts, including fund availability, rebalancing enhancements and TER calculations. Portfolios can include up to 30 investment options.



FundsNetwork Pension launched

A low-cost pension wrapper with a service fee of 0.25% and investor fee of £45 per year (if applicable*) with flexibility built in, that's continually updated. Features include no transaction charges on drawdown and pension transfers, and a broader range of assets available, including investment trusts, exchange-traded funds and company shares.

*Only payable if not already being paid on another account

2013



Get in touch

If you'd like to know more about anything included in this document, or you'd like to talk about anything else, please contact your usual representative.

