Close Brothers
Asset Management

My WealthPartner Online

Online investing so you can do it yourself if you are happy to make your own financial decisions without advice.

What does this service offer?

		My WealthPartner Online
Wrappers	ISA	✓
	Junior ISA	✓
	Lifetime ISA	✗
	Investment account	✓
	SIPP – although Partners are encouraged to consider the PwC Partner SIPP with Standard Life	✓
Investments	Funds – wide range from different fund managers	✓
	UK listed equities	✓
	Overseas equities	Available through funds and Bespoke investment management service
	Range of gilts and corporate bonds	✓
	Exchange Traded Funds	✓
	NS&I products	Only available under Advice service
	Venture capital trusts (VCT) and enterprise investment schemes (EIS)	Only available under Advice service
	UK and offshore life assurance bond wrappers	Only available under Advice service
	Hedge funds	✗
	Core funds list consistent with the PwC Partner SIPP	✓
Independence	Linked to PwC's Checkpoint Support	✓
	Auto-generated pre-trade emails	✓
	Link to PwC AIR feed for daily reconciliation	✓
	Auto-generated approval to trade emails	✓
	Ability to generate report for Checkpoint reconciliation purposes	✓

Dashboard view	Includes PwC SIPP with Standard Life	✓
	Includes all My WealthPartner investments	✓
	Ability to add other assets and debts	✓
	Family view of investments	✓
	Online valuations	✓
Pricing	Competitive rates for PwC Partners and family	✓
Accessibility	Via any device, at any time	✓
Support	Investment insight and research	✓
	Commentaries and webinars	✓
	Investment tools, market insight and education	✓
	Dedicated helpline	✓
	Dedicated UK-wide Close Brothers team for PwC Partners	✓
	Access to advice	✓
	Access to bespoke investment managers	✓
Investment services	Self-directed trading portal	✓
	Investment custody	✓
	Investment administration	✓

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