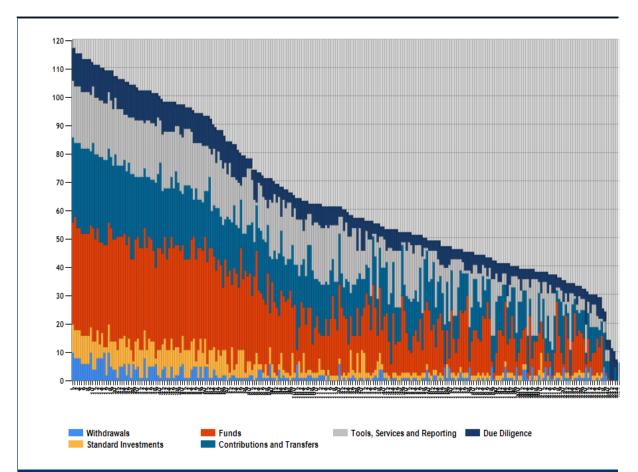
#### **Investment ISA DNA Graph Report**



ld:	Provider Name:	Product Name:
1	Quilter	ISA
2	Aviva	Aviva ISA Portfolio
3	Fundment	Fundment Stocks & Shares ISA
4	Fusion Wealth	Fusion Wealth ISA
5	LV=	ISA Portfolio
6	Scottish Widows	Platform Stocks & Shares ISA
7	SS&C Hubwise	Stocks & Shares ISA
8	Transact	Transact ISA
9	Nucleus	Nucleus Wrap ISA
10	7IM	7IM Platform Stocks & Shares ISA
11	M&G Wealth	M&G Wealth ISA
12	Morningstar Wealth Platform	ISA
13	Parmenion Capital Partners LLP	Parmenion Stocks & Shares ISA
14	True Potential Investments	True Potential ISA
15	abrdn	Elevate ISA
16	abrdn	Wrap Junior ISA
17	Aegon	Aegon ISA
18	P1 Investment Management	P1 ISA
19	AJ Bell Investcentre	AJ Bell Investcentre ISA
20	Fidelity Adviser Solutions	ISA
21	Fundment	Fundment Stocks & Shares Junior ISA
22	Fusion Wealth	Fusion Wealth Junior ISA
23	M&G Wealth	M&G Wealth Junior ISA
24	Bestinvest	Bestinvest Stocks & Shares ISA

25	James Brearley	ISA
26	Barclays	Smart Investor Investment ISA
27	KILLIK & Co	Killik & Co Stocks & Shares ISA
28	Wealthtime Classic	Wealthtime Classic ISA
29	Willis Owen	Willis Owen ISA
30	7IM	7IM Platform Stocks & Shares JISA
31	AJ Bell Investcentre	AJ Bell Investcentre Junior ISA
32	Morningstar Wealth Platform	JISA
33	P1 Investment Management	P1 Junior ISA
34	Quilter	Junior ISA
35	Raymond James Investment Services	RJIS Stocks & Shares ISA
36	abrdn	FundZone S&S ISA
37	Nucleus	Nucleus Wrap Junior ISA
38	True Potential Investments	True Potential Junior ISA
39	Hargreaves Lansdown	HL Stocks & Shares ISA
40	Interactive Investor	ISA
41	Aviva	Aviva Stocks & Shares ISA
42	Fidelity Adviser Solutions	Junior ISA
42	James Brearley	Junior ISA
43	Scottish Widows	Platform Stocks & Shares JISA
45	SS&C Hubwise	Stocks & Shares Junior ISA
		Transact Junior ISA
46 47	Transact  James Hay Partnership	James Hay Modular ISA
47	James Hay Partnership	James Hay Wrap ISA
49	Marlborough Select Platform Ltd	Select Stocks & Shares ISA
50	Parmenion Capital Partners LLP	Parmenion Stocks & Shares Junior ISA
51	Bank of Scotland	Self Select Stocks & Shares ISA
52	Halifax	Self Select Stocks & Shares ISA  Self Select Stocks & Shares ISA
53	Lloyds Bank	Share Dealing ISA
54	AJ Bell	AJ Bell Investment ISA
55	Aegon	Ageon Junior ISA
56	AJ Bell	Al Bell Junior ISA
57	Aviva	Aviva Junior ISA Portfolio
58	Marlborough Select Platform Ltd	Select Stocks & Shares Junior ISA
59	Hargreaves Lansdown	HL Junior ISA
60	Raymond James Investment Services	RJIS Junior ISA
61	Wealthtime Classic	Wealthtime Classic Junior ISA
62	Interactive Investor	Junior ISA
63	Willis Owen	Willis Owen Junior ISA
64	Fidelity Personal Investing	Stocks & Shares ISA
65	Fidelity Personal Investing	Stocks & Shares Junior ISA
66	IWeb	Self Select Stocks & Shares ISA
67	Pilling & Co Stockbrokers Ltd	Pilling Stocks & Shares ISA
68	Jarvis Investment Management	shareDeal active ISA
69	Aviva	Aviva My Money S&S ISA
70	NatWest Cushon	Cushon ISA
70	Vanguard Asset Management	Vanguard ISA
72		Chelsea FundStore Build your own ISA
	Chelsea Financial Services	·
73	Redmayne Bentley Pilling & Co Stockbrokers Ltd	Redmayne-Bentley Stocks & Shares ISA
74		Pilling Stocks & Shares Junior ISA Execution Only
75	Redmayne Bentley Bestinvest	Redmayne-Bentley Junior ISA  Bestinvest Stocks & Shares Junior ISA
76		
77	CMC Invest	CMC Invest Stocks & Shares ISA

78	AJ Bell Dodl	Dodl Investment ISA
79	NatWest Cushon	Cushon Junior ISA
80	Wealth at Work Limited	My Wealth ISA
81	M&G Securities Ltd	M&G Stocks & Shares ISA
82	Vanguard Asset Management	Vanguard Junior ISA
83	Invesco	Stocks & Shares ISA
84	KILLIK & Co	Killik & Co Junior Stocks & Shares ISA
85	NFU Mutual	Select ISA
86	Chelsea Financial Services	Chelsea FundStore Junior ISA
87	Close Asset Management Ltd	Close Stocks & Shares ISA
88	InvestEngine (UK) Limited	InvestEngine ISA
89	M&G Securities Ltd	M&G Stocks and Shares Junior ISA
90	Chip	Stocks & Shares ISA
91	Scottish Friendly	My Choice (ISA)
92	The Children's ISA Limited	Children's ISA Ethical Option
93	Jarvis Investment Management	shareDeal active Junior ISA
94	Prudential	Prudential ISA
95	Legal & General	Stocks and Shares ISA
96	Scottish Friendly	My Select Junior ISA
97	Legal & General (Portfolio Mgt Services)	Workplace ISA
98	Plum	Plum ISA
99	Jarvis Investment Management	X-O.CO.UK ISA
100	Quilter Cheviot	Quilter Cheviot Ltd ISA
101	Scottish Friendly	My Ethical Choice ISA
102	Trading 212	Trading 212 ISA
103	Jarvis Investment Management	X-O.CO.UK Junior ISA
104	NFU Mutual	Select Junior ISA
105	The Children's ISA Limited	Children's ISA Actively Managed Option
106	Beanstalk	Beanstalk Junior ISA
107	Columbia Threadneedle Investments	CT ISA (Investment Trust)
108	Investec Wealth & Investment (UK)	Invested AIM Portfolio IHT Plan ISA
109	Jupiter Asset Management	Jupiter ISA
110	Ninety One	Ninety One ISA
111	The Children's ISA Limited	Children's ISA Low Cost Option
112	Bank of Scotland	Bank of Scotland Ready Made Investments ISA
113	Columbia Threadneedle Investments	CT ISA (Unit Trust/OEIC)
114	Forester Life Ltd	Stakeholder Junior ISA
115	Halifax	Halifax Ready Made Investments ISA
116	Lloyds Bank	Lloyds Bank Ready Made Investment ISA
117	Pilling & Co Stockbrokers Ltd	Pilling Stocks & Shares Junior ISA Managed
118	Red Rose Friendly Society	Junior Shariah ISA
119	Scottish Friendly	My Ethical Select Junior ISA
120	The Children's ISA Limited	Children's ISA Shariah Option
121	Beanstalk	Beanstalk ISA
121	Monzo	Investments ISA
123	Forester Life Ltd	Stakeholder ISA
123	Freetrade	Investment ISA
125	Stellar Asset Management Ltd	Stellar AIM IHT Service
	-	Artemis ISA
126 127	Artemis Fund Managers Ltd Charles Stanley & Co Ltd	Charles Stanley Direct ISA
	,	·
128	IG Trading and Investments Ltd	Stocks & Shares ISA  Virgin Manay Stocks and Shares ISA
129	Virgin Money Wesleyen Unit Trust Mars Ltd	Virgin Money Stocks and Shares ISA
130	Wesleyan Unit Trust Mgrs Ltd	Wesleyan Unit Trust ISA

131	Charles Stanley & Co Ltd	Charles Stanley Direct Junior ISA
132	OneFamily	OneFamily Junior ISA
133	Post Office Money	Post Office Junior ISA
134	Red Rose Friendly Society	Shariah ISA
135	Columbia Threadneedle Investments	CT Junior ISA (Investment Trust)
136	Premier Miton Investors	Premier Miton ISA
137	Waystone Management (UK) Limited	ISA
138	McInroy & Wood	Stocks & Shares ISA
139	Schroder UTs Ltd	Schroders Stocks & Shares ISA
140	EdenTree Investment Management Ltd	ISA
141	Forester Life Ltd	Shariah Junior ISA
142	Fundamental Asset Management	Fundamental AIM IHT ISA (Direct)
143	Quilter Cheviot	Quilter Cheviot Ltd Junior ISA
144	Triodos Bank	Stocks & Shares ISA
145	Unicorn Asset Management	Unicorn ISA
146	BNY Mellon Fund Managers Ltd	Stocks & Shares ISA
147	Liontrust Asset Mgmt	Liontrust ISA
147	Margetts Fund Management Ltd	Margetts Junior ISA
149	NatWest	NatWest Invest Junior ISA
150	Royal Bank of Scotland	RBS Invest Junior ISA
151	Wesleyan Assurance Society	Wesleyan With Profits ISA
152	Forester Life Ltd	Shariah ISA
153	Fundsmith LLP	Fundsmith ISA
154	Margetts Fund Management Ltd	Margetts ISA
155	Scottish Friendly	My Easy Choice (ISA)
156	,	
157	Wesleyan Unit Trust Mgrs Ltd	Wesleyan Unit Trust Junior ISA  AXA Stocks and Shares ISA
158	AXA Investment Managers UK Ltd Shepherds Friendly Society	Shepherds Junior ISA
159	Fundsmith LLP	Fundsmith Junior ISA
160	Janus Henderson Investors	Henderson Investment Funds ISA
161	LV=	Stocks & Shares ISA
	M&S Bank	
162 163	Red Rose Friendly Society	Marks & Spencer Stocks and Shares ISA ESG ISA
164	St. James's Place UT Group Ltd	St James Place ISA
	'	DIY ISA
165 166	Moneyfarm NuWealth	Stocks and Shares Junior ISA
167		Junior ESG ISA
	Red Rose Friendly Society	
168 169	Unicorn Asset Management  Vanguard Asset Management	Unicorn JISA Vanguard Managed ISA
170	Forces Mutual	5 5
170	FundRock Partners Limited	Scottish Friendly My Sovereign Investment ISA  FP WHEB Asset Management ISA
171	OneFamily	OneFamily Stocks & Shares ISA
173	Orbis	Orbis Stocks & Shares ISA
174	WAY Fund Managers Ltd	WAY Stocks and Shares ISA
175	First Sentier Investors (UK) Funds Ltd	First Sentier Investors Stocks and Shares ISA
176	Liontrust Asset Mgmt	Liontrust Junior ISA
176	St. James's Place UT Group Ltd	St James Place Junior ISA
177	Unity Mutual	Unity Mutual Flexible ISA
179	Wealthify Limited	Wealthify Junior ISA
180	FundRock Partners Limited	FP Octopus Investment Funds ISA
181	Healthy Investment	Healthy Investment Ethical ISA
182	Healthy Investment	Healthy Investment Ethical ISA -Adviser charging
183	Orbis	Orbis Junior Stocks & Shares ISA
103	OLDIS	OTDIS JUINOT SLOCKS & SHALES ISM

184	Unity Mutual	Unity Mutual Junior ISA
185	FundRock Partners Limited	FP Foresight ISA
186	Sheffield Mutual Friendly Society	Sheffield Mutual Sustainable ISA
187	Waystone Management (UK) Limited	Junior ISA
188	Netwealth	Netwealth Junior ISA
189	Nutmeg	Nutmeg Junior ISA
190	ConBrio	ConBrio ISA
191	Fundamental Asset Management	Fundamental AIM IHT ISA (Platform)
192	Healthy Investment	Healthy With Profits Junior ISA
193	Healthy Investment	Healthy With Profits Junior ISA - Adviser charging
194	Shepherds Friendly Society	Shepherds Stocks and Shares ISA
195	UBS	UBS ISA
196	Investment Fund Services Ltd	IFSL ISA
197	McInroy & Wood	Stocks & Shares Junior ISA
198	Nutmeg	Nutmeg Stocks & Shares ISA
199	SVM Asset Management Ltd	SVM ISA
200	ConBrio	ConBrio JISA
201	FundRock Partners Limited	FP Apollo ISA
202	FundRock Partners Limited	FP Volare ISA
203	Investment Fund Services Ltd	IFSL Junior ISA
204	Netwealth	Netwealth ISA
205	NuWealth	Stocks and Shares ISA
206	Sheffield Mutual Friendly Society	Sheffield Mutual Investment ISA
207	Allianz Global Investors	Stocks & Shares ISA
208	NatWest	NatWest Invest ISA
209	Puma Investments	Puma AIM IHT ISA
210	Royal Bank of Scotland	RBS Invest ISA
211	Saxo Capital Markets UK Limited	Saxo ISA
212	Wahed Invest	Wahed Invest ISA
213	Metfriendly	Metfriendly Junior ISA
214	Moneybox	Moneybox Junior ISA
215	Sheffield Mutual Friendly Society	Sheffield Mutual Investment Junior ISA
216	Wealthify Limited	Wealthify Investment ISA
217	FundRock Partners Limited	FP Russell ISA
218	Sarasin Investment Funds Ltd	Sarasin ISA
219	Moneyfarm	Managed ISA
220	NFU Mutual	Shrewd Savings Plan ISA
221	FundRock Partners Limited	FP Pictet Stocks & Shares ISA
222	Moneybox	Moneybox ISA
223	Rathbone Asset Management Limited	Rathbone Greenbank Multi-Asset Portfolios ISA
224	Slater Investments Limited	Slater Stocks & Shares Junior ISA
225	Artemis Fund Managers Ltd	Artemis Junior ISA
226	Octopus Investments	Octopus AIM Inheritance Tax ISA
227	Rathbone Asset Management Limited	Rathbone Single Strategy Fund ISA
228	Apex Fundrock Ltd	MI Funds ISA
229	Slater Investments Limited	Slater Stocks & Shares ISA
230	IG Trading and Investments Ltd	Smart Portfolio ISA
231	Metfriendly	Metfriendly Lump Sum ISA
232	Metfriendly	Metfriendly Monthly Savings ISA
233	Moneyfarm	Stocks & Shares Junior ISA
234	Valu-Trac Investment Management Ltd	VT Sinfonia OEIC ISA
235	Downing	Downing AIM ISA
236		VT Sinfonia OEIC JISA
230	Valu-Trac Investment Management Ltd	V I SIIIIOIIId OEIC JISA

237	Rathbone Asset Management Limited	Rathbone Multi Asset Portfolio ISA	
238	TIME Investments	TIME Investments AIM IHT ISA	
239	Blackfinch Investments	Adapt AIM ISA Portfolios	
240	Unicorn Asset Management	Unicorn AIM IHT ISA Portfolio Service	
241	Credo	Credo ISA	
242	Platform One	Platform One Stocks & Shares Junior ISA	
243	BlackRock	BlackRock NISA	
244	Platform One	Platform One Stocks & Shares ISA	
245	Rathbones Investment Management	ISA	

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	<b>ISA</b> Quilter	<b>Aviva ISA Portfolio</b> Aviva	Fundment Stocks & Shares ISA Fundment	Fusion Wealth ISA Fusion Wealth
Junior ISA	1	1	1	1
Platform/Self Select ISA	5	5	5	5
Flexible ISA	5	5	5	5
Online Applications	5	5	5	5
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	5	5	5
APS Transfers In Allowed	5	5	5	5
Phased Investment Option	5	1	5	5
Bed and ISA	5	5	5	5
Transfers In From Child Trust Funds	0	0	0	0
In-Specie Transfers	5	5	5	5
Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	5	1	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	5	5	5	5
ETFs Available	5	5	5	5
Investment Trusts	5	5	5	5
Income Options Available	5	3	3	3
Auto Portfolio Rebalancing	5	5	5	5
Total	117	115	115	115
	ISA Portfolio LV=	Platform Stocks & Shares ISA Scottish Widows	Stocks & Shares ISA SS&C Hubwise	Transact ISA Transact
Junior ISA	1	1	1	1
Platform/Self Select ISA	5	5	5	5
Flexible ISA	5	5	5	5
Online Applications	5	5	5	5
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	5	5	5
APS Transfers In Allowed	5	5	5	5
Phased Investment Option	5	5	5	5

Bed and ISA	5	5	5	5
Transfers In From Child		-	-	
Trust Funds	0	0	0	0
In-Specie Transfers	5	5	5	5
Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	1	1	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	<u> </u> 5	5
Funds Non-UK	5	5	5	5
ETFs Available	5	5	5	5
Investment Trusts	5	5	5	5
	1	1	5	5
Auto Portfolio Rebalancing		5	1	1
Total	113	113	113	113
i otal		7IM Platform Stocks &		ISA
	<b>Nucleus Wrap ISA</b> Nucleus	Shares ISA 7IM	<b>M&amp;G Wealth ISA</b> M&G Wealth	Morningstar Wealth Platform
Junior ISA	1	1	1	1
Platform/Self Select ISA	5	5	5	5
Flexible ISA	5	5	1	5
Online Applications	5	5	5	5
Online Valuations	5	5	5	5
Online Contribution				
History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted		-	-	-
Subscriptions	ל	5	5	5
APS Transfers In Allowed	5	5	5	5
Phased Investment Option	1	5	5	1
Bed and ISA	5	5	5	5
Transfers In From Child	0	0	0	0
Trust Funds				
In-Specie Transfers	5	5	5	5
Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	1	5	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	5	5	5	5
ETFs Available	4	5	5	5
Investment Trusts	5	5	5	5
·	5	3	3	3
Auto Portfolio Rebalancing		1	1	5
Total	112	111		111
	Parmenion Stocks &	True Potential ISA	Elevate ISA	Wrap Junior ISA
	Shares ISA	True Potential	abrdn	abrdn

	Parmenion Capital	Investments		
	Partners LLP			
Junior ISA	1	1	1	5
Platform/Self Select ISA	5	5	5	5
Flexible ISA	5	5	1	0
Online Applications	5	5	5	5
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted	-	F	-	
Subscriptions	5	5	5	0
APS Transfers In Allowed	5	5	5	0
Phased Investment Option	5	5	5	5
Bed and ISA	5	5	1	5
Transfers In From Child Trust Funds	0	0	0	5
In-Specie Transfers	5	5	5	5
Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	1	1	5
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	S	5
Funds Non-UK	5	1	5	5
ETFs Available	4	4	5	4
Investment Trusts	1	5	5	5
	3	3	5	0
Auto Portfolio Rebalancing		5	5	5
Total	110	110	109	109
Total		P1 ISA	103	103
	Aegon ISA	P1 Investment	AJ Bell Investcentre ISA	ISA
	Aegon	Management	AJ Bell Investcentre	Fidelity Adviser Solutions
Junior ISA	1	1	1	1
Platform/Self Select ISA	5	5	5	5
Flexible ISA	5	5	5	1
Online Applications	5	5	5	5
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	5	5	5
APS Transfers In Allowed	5	5	1	5
Phased Investment Option	5	5	5	5
Bed and ISA	5	5	5	5
Transfers In From Child Trust Funds	0	0	0	0
In-Specie Transfers	5	5	5	5
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	ı	I	ı	
Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	1	1	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	5	5	5	5
ETFs Available	1	5	5	5
Investment Trusts	1	5	5	5
Income Options Available	5	1	3	3
Auto Portfolio Rebalancing	5	1	1	1
Total	109	109	107	107
	Fundment Stocks &	England Mandala Landa (188	MAG CAN A HILL A STANKE	Bestinvest Stocks &
	Shares Junior ISA	Fusion Wealth Junior ISA Fusion Wealth	M&G Wealth Junior ISA M&G Wealth	Shares ISA
	Fundment	rasion weath	Was Wealth	Bestinvest
Junior ISA	5	5	5	1
Platform/Self Select ISA	5	5	5	5
Flexible ISA	0	0	0	5
Online Applications	5	5	5	5
Online Valuations	5	5	5	5
Online Contribution	-	-	-	-
History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	0	0	0	5
	0	0	0	5
Phased Investment Option		5	5	1
Bed and ISA	5	5	5	5
Transfers In From Child	5	5	5	5
Trust Funds	5	5	5	0
In-Specie Transfers	5	5	5	5
Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	1	5	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	5	5	5	5
ETFs Available	5	5	5	5
Investment Trusts	5	5	5	5
Income Options Available	0	0	0	1
Auto Portfolio Rebalancing		5	1	1
Total	106	106	106	105
	<b>ISA</b> James Brearley	Smart Investor Investment ISA	Killik & Co Stocks & Shares ISA	Wealthtime Classic ISA Wealthtime Classic
	James breamey	Barclays	KILLIK & Co	Wealthtille Classic
Junior ISA	1	1	1	1
Platform/Self Select ISA	5	5	5	5
		5		

	T	T	T	Γ
Online Applications	1	5	1	5
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	5	5	5
APS Transfers In Allowed	5	5	5	5
Phased Investment Option	1	5	1	5
Bed and ISA	5	5	5	5
Transfers In From Child Trust Funds	0	0	0	0
In-Specie Transfers	5	5	5	5
Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	1	1	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	5	1	5	5
ETFs Available	5	5	4	0
Investment Trusts	5	5	5	1
	1	0	5	1
		1	1	5
Auto Portfolio Rebalancing	ID .			
Total	105	104	104	104
				104
	105 Willis Owen ISA	104 7IM Platform Stocks & Shares JISA	104 AJ Bell Investcentre Junior	104 JISA Morningstar Wealth
Total Junior ISA	105 Willis Owen ISA Willis Owen	104 7IM Platform Stocks & Shares JISA 7IM	104 AJ Bell Investcentre Junior	104 JISA Morningstar Wealth Platform 5
Total  Junior ISA  Platform/Self Select ISA	105 Willis Owen ISA Willis Owen 1	104 7IM Platform Stocks & Shares JISA 7IM 5	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre 5	104 JISA Morningstar Wealth Platform
Junior ISA Platform/Self Select ISA Flexible ISA	105 Willis Owen ISA Willis Owen 1 5	104 7IM Platform Stocks & Shares JISA 7IM 5	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre 5 5	104 JISA Morningstar Wealth Platform 5 5
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications	Willis Owen ISA Willis Owen  1 5 5	104 7IM Platform Stocks & Shares JISA 7IM 5 0 5	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre 5 5 0	104 JISA Morningstar Wealth Platform 5 5 0
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	105 Willis Owen ISA Willis Owen 1 5	104 7IM Platform Stocks & Shares JISA 7IM 5	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre 5 5	104 JISA Morningstar Wealth Platform 5 5
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History	Willis Owen ISA Willis Owen  1  5  5  5  5	104 7IM Platform Stocks & Shares JISA 7IM 5 0 5 5 5	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre 5 5 0 5 5 5	104 JISA Morningstar Wealth Platform 5 5 5 0 5 5
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History	Willis Owen ISA Willis Owen  1  5  5  5  5  5	104 7IM Platform Stocks & Shares JISA 7IM 5 5 5 0 5 5 5 5	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre 5 5 0 5 5 5 5 5 5	104 JISA Morningstar Wealth Platform 5 5 5 0 5 5 5 5
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted	Willis Owen ISA Willis Owen  1  5  5  5  5	104 7IM Platform Stocks & Shares JISA 7IM 5 0 5 5 5	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre 5 5 0 5 5 5	104 JISA Morningstar Wealth Platform 5 5 5 0 5 5
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums	Willis Owen ISA Willis Owen  1  5  5  5  5  5	104 7IM Platform Stocks & Shares JISA 7IM 5 5 0 5 5 5 5 5 6	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre 5 5 0 5 5 5 5 5	104 JISA Morningstar Wealth Platform 5 5 5 0 5 5 5 5 5 5
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed	105 Willis Owen ISA Willis Owen  1 5 5 5 5 5 5 5 5 5 5 5 5 5	104 7IM Platform Stocks & Shares JISA 7IM 5 5 0 5 5 5 5 0 0 0 0	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre  5 5 0 5 5 5 5 0 0 0 0	104 JISA Morningstar Wealth Platform 5 5 5 0 5 5 5 5 0 0 0 0
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option	105 Willis Owen ISA Willis Owen  1 5 5 5 5 5 5 5 5 1	104 7IM Platform Stocks & Shares JISA 7IM 5 5 5 0 5 5 5 0 0 5 5 5 5 5 5 5 5 6 7 7 7 7 7 7 7 7 7 7 7	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre  5 5 6 7 5 7 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	104 JISA Morningstar Wealth Platform  5 5 5 6 5 5 6 7 7 7 8 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed	105 Willis Owen ISA Willis Owen  1 5 5 5 5 5 5 5 5 5 5 5 5 5	104 7IM Platform Stocks & Shares JISA 7IM 5 5 0 5 5 5 5 0 0 0 0	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre  5 5 0 5 5 5 5 0 0 0 0	104 JISA Morningstar Wealth Platform 5 5 5 0 5 5 5 5 0 0 0 0
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option  Bed and ISA  Transfers In From Child	105 Willis Owen ISA Willis Owen  1 5 5 5 5 5 5 5 1 1	104 7IM Platform Stocks & Shares JISA 7IM 5 5 6 0 5 5 6 0 0 5 5 5 5 5 5 5 5 5 5 5	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre  5 5 6 7 5 7 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	104 JISA Morningstar Wealth Platform  5 5 5 6 5 5 6 7 7 7 8 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds	105 Willis Owen ISA Willis Owen  1 5 5 5 5 5 5 5 1 1 1 0	104 7IM Platform Stocks & Shares JISA 7IM 5 5 5 0 5 5 5 0 0 5 5 5 5 5 5 5 5 5 5	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre  5 5 0 5 5 5 0 0 0 5 5 5 5 5 5 5 5 5 6 7 7 8 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	104 JISA Morningstar Wealth Platform  5 5 5 0 5 5 5 0 0 1 5 5 5 5 5 5 5 5 5
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option  Bed and ISA  Transfers In From Child  Trust Funds  In-Specie Transfers	105 Willis Owen ISA Willis Owen  1 5 5 5 5 5 5 5 1 1 1 0 5	104 7IM Platform Stocks & Shares JISA 7IM 5 5 6 0 5 5 6 0 0 5 5 5 5 5 5 5 5 5 5 5	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre  5 5 6 7 5 7 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	104 JISA Morningstar Wealth Platform 5 5 5 0 5 5 5 0 0 1 5 5 5 5 5 5 5 5 5 5
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option  Bed and ISA  Transfers In From Child  Trust Funds  In-Specie Transfers  Number of Funds	105 Willis Owen ISA Willis Owen  1 5 5 5 5 5 5 1 1 1 0 5 5 5 5 5	104 7IM Platform Stocks & Shares JISA 7IM 5 5 0 5 5 0 5 5 5 5 5 5 5 5 5 5 5 5 5	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre  5 5 0 0 5 5 5 0 0 0 5 5 5 5 5 5 5 5 5	104 JISA Morningstar Wealth Platform  5 5 0 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds	Willis Owen ISA Willis Owen ISA Willis Owen  1 5 5 5 5 5 5 5 1 1 1 0 5 5 5 5 5 5 5	104 7IM Platform Stocks & Shares JISA 7IM 5 5 6 0 5 5 6 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre  5 5 0 0 5 5 5 0 0 0 5 5 5 5 5 5 5 5 5	104 JISA Morningstar Wealth Platform  5 5 6 7 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds	105 Willis Owen ISA Willis Owen  1 5 5 5 5 5 5 1 1 1 0 5 5 5 1 1 1	104 7IM Platform Stocks & Shares JISA 7IM 5 5 6 0 5 5 5 6 0 0 5 5 5 5 5 5 5 5 5 5	104 AJ Bell Investcentre Junior ISA AJ Bell Investcentre  5 5 0 0 5 5 5 0 0 0 5 5 5 5 5 5 5 1	104 JISA Morningstar Wealth Platform  5 5 0 5 5 5 5 0 0 1 5 5 5 5 5 5 5 5 5

ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	5	5	5	5
ETFs Available	5	5	5	5
Investment Trusts	5	5	5	5
Income Options Available	3	0	0	0
Auto Portfolio Rebalancing	1	1	1	5
Total	103	102	102	102
	<b>P1 Junior ISA</b> P1 Investment Management	<b>Junior ISA</b> Quilter	RJIS Stocks & Shares ISA Raymond James Investment Services	FundZone S&S ISA abrdn
Junior ISA	5	5	1	1
Platform/Self Select ISA	5	5	5	5
Flexible ISA	0	0	5	5
Online Applications	5	5	1	5
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	0	5
Additional Permitted Subscriptions	0	0	5	5
APS Transfers In Allowed	0	0	5	5
Phased Investment Option	5	5	1	5
Bed and ISA	5	1	5	5
Transfers In From Child Trust Funds	5	5	0	0
In-Specie Transfers	5	5	5	5
Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	1	1	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	5	5	5	1
ETFs Available	5	5	5	1
Investment Trusts	5	5	5	1
Income Options Available	0	0	3	5
Auto Portfolio Rebalancing	1	5	5	1
Total	102	102	102	101
	Nucleus Wrap Junior ISA Nucleus	True Potential Junior ISA True Potential Investments	HL Stocks & Shares ISA Hargreaves Lansdown	ISA Interactive Investor
Junior ISA	5	5	1	1
Platform/Self Select ISA	5	5	5	5
Flexible ISA	0	0	1	1
Online Applications	5	5	5	5
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	0
Online Transaction History	c	5	5	5

In 1 n .	ı	ı		
Regular Premiums	5	5	5	5
Additional Permitted	0	0	5	5
Subscriptions	-	-	_	_
APS Transfers In Allowed	0	0	5	5
Phased Investment Option		5	1	5
Bed and ISA	5	5	5	5
Transfers In From Child Trust Funds	5	5	0	0
In-Specie Transfers	5	5	5	5
Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	1	1	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	5	1	5	5
ETFs Available	4	4	4	5
Investment Trusts	5	5	5	5
	0	0	1	0
Auto Portfolio Rebalancing		5	1	1
Total	101	101		99
Total	101	101	100	Platform Stocks & Shares
	Aviva Stocks & Shares ISA Aviva	Junior ISA Fidelity Adviser Solutions	Junior ISA James Brearley	JISA Scottish Widows
Junior ISA	1	5	5	5
Platform/Self Select ISA	5	5	5	5
Flexible ISA				
II ICVIDIC IOU	5	o	0	0
	5		0	0 5
Online Applications	5	5	1	5
Online Applications Online Valuations			-	
Online Applications	5	5	1	5
Online Applications Online Valuations Online Contribution History	5 5 5	5	1	5
Online Applications Online Valuations Online Contribution History Online Transaction History	5 5 5	5 5 5	1 5 5	5 5 5
Online Applications Online Valuations Online Contribution History	5 5 5 5 5	5 5 5 5 5	1 5 5	5 5 5 5 5
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions	5 5 5 5 5 5	5 5 5 5 5 0	1 5 5 5 5 5	5 5 5 5 5 0
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed	5 5 5 5 5 5 5	5 5 5 5 5 0	1 5 5 5 5 0	5 5 5 5 5 0 0
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option	5 5 5 5 5 5 5 5	5 5 5 5 5 0 0	1 5 5 5 5 0 0	5 5 5 5 5 0 0
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA	5 5 5 5 5 5 5	5 5 5 5 5 0	1 5 5 5 5 0	5 5 5 5 5 0 0
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option	5 5 5 5 5 5 5 5	5 5 5 5 5 0 0	1 5 5 5 5 0 0	5 5 5 5 5 0 0
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child	5 5 5 5 5 5 5 1	5 5 5 5 5 0 0 0 5	1 5 5 5 5 0 0	5 5 5 5 5 0 0 0 5
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds	5 5 5 5 5 5 5 5 1 1	5 5 5 5 5 0 0 0 5 1	1 5 5 5 5 0 0 0 1 5 5	5 5 5 5 5 0 0 0 5 1 1 1
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers	5 5 5 5 5 5 5 5 1 1 1	5 5 5 5 5 0 0 0 5 1 5	1 5 5 5 5 0 0 1 5 5 5	5 5 5 5 5 0 0 0 5 1 1
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds	5 5 5 5 5 5 5 1 1 1 0	5 5 5 5 5 0 0 0 5 1 5 5	1 5 5 5 5 6 0 0 1 5 5 5	5 5 5 5 5 0 0 0 5 1 1
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds	5 5 5 5 5 5 5 1 1 1 0 5 5 5	5 5 5 5 5 0 0 0 5 1 5 5 5	1 5 5 5 5 0 0 0 1 5 5 5 5 5	5 5 5 5 5 0 0 0 5 1 1 1 5 5 5
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds	5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 5 5 5 0 0 0 5 1 5 5 5 5 5	1 5 5 5 5 5 0 0 0 1 5 5 5 5 5 5	5 5 5 5 5 0 0 0 5 1 1 1 5 5 5
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds	5 5 5 5 5 5 5 1 1 0 5 5 5 5 1	5 5 5 5 5 5 0 0 0 5 1 1 5 5 5 5 5	1 5 5 5 5 5 6 0 0 1 5 5 5 5 5 5 5	5 5 5 5 5 0 0 0 5 1 1 1 5 5 5 5
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds Ethical Funds	5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	1	5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds Ethical Funds Ethical Funds	5 5 5 5 5 5 5 5 1 1 1 0 5 5 5 5 1 1 5 5 5 5	5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	1	5 5 5 5 5 6 0 0 0 5 1 1 1 5 5 5 5 1 1 5 5 5
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds Ethical Funds ESG Funds Unit Trusts/OEICs Funds Non-UK	5 5 5 5 5 5 5 1 1 0 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 5 5 5 6 7 8 9 9 9 9 9 9 9 9 9 9 9 9 9	1 5 5 5 5 5 6 0 0 0 1 1 5 5 5 5 5 5 5 5 5 5	5 5 5 5 6 7 7 7 8 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8
Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds Ethical Funds ESG Funds Unit Trusts/OEICs	5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 5 5 5 5 0 0 0 5 1 1 5 5 5 5 5 5 5 5	1	5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5

Income Options Available	2	0	lo	lo I
Auto Portfolio Rebalancing		1	5	5
		98	98	98
Total	98 Stocks & Shares Junior ISA		James Hay Modular ISA	
	SS&C Hubwise	Transact Junior ISA Transact	James Hay Partnership	James Hay Wrap ISA James Hay Partnership
Junior ISA	5	5	1	1
Platform/Self Select ISA	5	5	5	5
Flexible ISA	0	0	1	1
Online Applications	5	5	5	1
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	0	0	5	5
APS Transfers In Allowed	0	0	5	5
Phased Investment Option	5	5	1	1
Bed and ISA	1	5	1	5
Transfers In From Child Trust Funds	5	5	0	0
In-Specie Transfers	5	5	5	5
Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	1	1	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	5	1	5	5
ETFs Available	5	5	5	5
Investment Trusts	5	5	5	5
	0	0	<u> -</u>  1	1
Auto Portfolio Rebalancing		1	1	1
Total	98	98	97	97
	Select Stocks & Shares ISA Marlborough Select Platform Ltd	Parmenion Stocks & Shares Junior ISA Parmenion Capital Partners LLP	Self Select Stocks & Shares ISA Bank of Scotland	Self Select Stocks & Shares ISA Halifax
Junior ISA	1	5	1	1
Platform/Self Select ISA	5	5	5	5
Flexible ISA	5	0	1	1
Online Applications	5	5	5	5
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	0	5	5
APS Transfers In Allowed	1	0	5	5
Phased Investment Option	1	5	1	1

E 1 1151	I.	I_	I_	I_
Bed and ISA	1	5	5	5
Transfers In From Child Trust Funds	o	1	0	0
In-Specie Transfers	5	5	5	5
Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	1	1	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	<u> </u>	5	1	1
ETFs Available	5	4	5	ς
	5	1	5	5
Investment Trusts		0	0	
<u> </u>	1			0
Auto Portfolio Rebalancing		5 <b>97</b>	1	1
Total	97 Share Dealing ISA	AJ Bell Investment ISA	96	96 AJ Bell Junior ISA
	Lloyds Bank	AJ Bell AJ Bell	<b>Aegon Junior ISA</b> Aegon	AJ Bell AJ Bell
Junior ISA	1	1	5	5
Platform/Self Select ISA	5	5	5	5
Flexible ISA	1	1	0	0
Online Applications	5	5	1	5
Online Valuations	5	5	5	5
Online Contribution	-	-	F	-
History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	5	0	0
APS Transfers In Allowed	5	1	0	0
Phased Investment Option	1	1	5	1
Bed and ISA	5	1	5	1
Transfers In From Child Trust Funds	0	0	5	5
In-Specie Transfers	5	5	5	5
Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	1	<u>                                     </u>	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	1	5	5	5
ETFs Available	5	5	1	5
Investment Trusts	5	5	1	5
	0	3	0	0
Auto Portfolio Rebalancing		1	5	1
Total	96	95		94
		Select Stocks & Shares		RJIS Junior ISA
	Aviva Junior ISA Portfolio	Junior ISA	HL Junior ISA	Raymond James
	Aviva	Marlborough Select	Hargreaves Lansdown	Investment Services

		Platform Ltd		
Junior ISA	5	5	5	5
Platform/Self Select ISA	5	5	5	5
Flexible ISA	0	0	0	0
Online Applications	5	5	5	1
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	0
Additional Permitted Subscriptions	0	0	0	0
APS Transfers In Allowed	0	0	0	0
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	5
Transfers In From Child Trust Funds	1	5	5	5
In-Specie Transfers	5	5	5	5
Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	1	1	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	5	1	5	5
ETFs Available	5	5	4	5
Investment Trusts	5	5	5	5
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	5	5	1	5
Total	94	94	93	93
	Wealthtime Classic Junior ISA Wealthtime Classic	Junior ISA Interactive Investor	<b>Willis Owen Junior ISA</b> Willis Owen	Stocks & Shares ISA Fidelity Personal Investing
Junior ISA	5	5	5	1
Platform/Self Select ISA	5	5	5	5
Flexible ISA	0	0	0	1
Online Applications	1	5	5	5
Online Valuations	5	5	5	5
Online Contribution History	5	0	5	5
Online Transaction History	5	0	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	0	0	0	1
APS Transfers In Allowed	0	0	0	1
Phased Investment Option	5	5	1	5
Bed and ISA	5	5	1	5
Transfers In From Child Trust Funds	5	5	1	0
In-Specie Transfers	5	5	5	1
Number of Funds	5	5	5	5

External Funds	5	5	5	5
Life Funds	)  -			
Passive/Index Funds	5	5	5	5
			5	
Ethical Funds	5 I-	5	5  -	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	5	5	5	1
ETFs Available	0	5	5	3
Investment Trusts	1	5	5	5
	0	0	0	3
Auto Portfolio Rebalancing		1	1	1
Total	93	92	90	89
	Stocks & Shares Junior ISA	Self Select Stocks & Shares ISA	Pilling Stocks & Shares ISA	shareDeal active ISA Jarvis Investment
	Fidelity Personal Investing	IWeb	Pilling & Co Stockbrokers Ltd	Management
Junior ISA	5	1	1	1
Platform/Self Select ISA	5	5	5	5
Flexible ISA	0	1	5	5
Online Applications	5	5	1	5
Online Valuations	5	5	5	5
Online Contribution	7	3		5
History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	1	1	1
Additional Permitted Subscriptions	0	5	5	5
APS Transfers In Allowed	0	5	5	5
Phased Investment Option	5	1	1	1
Bed and ISA	5	1	5	5
Transfers In From Child Trust Funds	1	0	0	0
In-Specie Transfers	1	5	5	5
Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	1	1	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	0
ESG Funds	5	5	5	0
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	1	1	1	1
ETFs Available	3	5	0	4
Investment Trusts	5	5	5	5
	0	0	1	1
Auto Portfolio Rebalancing	1	1	1	1
Total	88	88	88	86
		<b>Cushon ISA</b> NatWest Cushon	Vanguard ISA Vanguard Asset Management	Chelsea FundStore Build your own ISA Chelsea Financial Services
Junior ISA	1	1	1	1
Platform/Self Select ISA	5	1	5	5
Flexible ISA	1	5	5	5
Online Applications	5	5	5	5

Online Valuations	5	5	5	5
Online Contribution	F	r		
History	5	5	0	0
Online Transaction History	5	5	5	0
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	1	5	5	5
APS Transfers In Allowed	1	5	5	5
Phased Investment Option	1	1	5	1
Bed and ISA	1	1	0	1
Transfers In From Child Trust Funds	0	0	0	0
In-Specie Transfers	5	1	1	5
Number of Funds	5	5	4	5
External Funds	5	5	1	5
Life Funds	1	1	1	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	1	5	5	5
ETFs Available	4	1	5	1
Investment Trusts	5	1	1	1
Income Options Available	1	0	0	1
Auto Portfolio Rebalancing	1	1	0	1
Total	84	84	84	83
Total		Pilling Stocks & Shares		
Total	Redmayne-Bentley Stocks	Pilling Stocks & Shares Junior ISA Execution Only	84 Redmayne-Bentley Junior ISA	
Total		Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers	Redmayne-Bentley Junior	Bestinvest Stocks &
	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd	Redmayne-Bentley Junior ISA	Bestinvest Stocks & Shares Junior ISA Bestinvest
Junior ISA	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5	Redmayne-Bentley Junior ISA	Bestinvest Stocks & Shares Junior ISA Bestinvest
Junior ISA Platform/Self Select ISA	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5	Redmayne-Bentley Junior ISA	Bestinvest Stocks & Shares Junior ISA Bestinvest
Junior ISA Platform/Self Select ISA Flexible ISA	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5	Redmayne-Bentley Junior ISA Redmayne Bentley 5	Bestinvest Stocks & Shares Junior ISA Bestinvest 5
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 5	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0	Redmayne-Bentley Junior ISA Redmayne Bentley 5	Bestinvest Stocks & Shares Junior ISA Bestinvest 5 5 0
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5	Redmayne-Bentley Junior ISA Redmayne Bentley 5	Bestinvest Stocks & Shares Junior ISA Bestinvest 5
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 5	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0	Redmayne-Bentley Junior ISA Redmayne Bentley 5	Bestinvest Stocks & Shares Junior ISA Bestinvest 5 5 0
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley  1 5 5 5 1 5	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1	Redmayne-Bentley Junior ISA Redmayne Bentley 5	Bestinvest Stocks & Shares Junior ISA Bestinvest  5 5 0 5
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley  1 5 5 5 1 5	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5	Redmayne-Bentley Junior ISA Redmayne Bentley 5 5 0 1 5 5	Bestinvest Stocks & Shares Junior ISA Bestinvest  5 5 0 5 0
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley  1 5 5 5 1 5 5 5	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 5 5 5 5 5 5 5	Redmayne-Bentley Junior ISA Redmayne Bentley  5 5 0 1 5 5 5 5 5	Bestinvest Stocks & Shares Junior ISA Bestinvest  5 5 0 5 0 0 5 0 0 5 5
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley  1 5 5 5 1 5 5 5	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 5 5	Redmayne-Bentley Junior ISA Redmayne Bentley  5 5 0 1 5 5 5	Bestinvest Stocks & Shares Junior ISA Bestinvest  5 5 0 5 0 0 0
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley  1 5 5 5 1 5 5 5	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 5 5 5 5 5 5 5	Redmayne-Bentley Junior ISA Redmayne Bentley  5 5 0 1 5 5 5 5 5	Bestinvest Stocks & Shares Junior ISA Bestinvest  5 5 0 5 0 0 5 0 0 5 5
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley  1 5 5 5 1 5 1 5 5 5 5 5 1 5 5 5 1	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 5 0 0 1 5 0	Redmayne-Bentley Junior ISA Redmayne Bentley 5 5 0 1 5 5 5 0 1 5 5 0	Bestinvest Stocks & Shares Junior ISA Bestinvest  5 5 0 0 0 0 0 5 0 0
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley  1 5 5 5 1 5 1 5 5 5 5 5 1 5 5 5 1	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 5 0 0 1 0 0	Redmayne-Bentley Junior ISA Redmayne Bentley  5 5 0 1 5 5 5 0 0 0 0 0	Bestinvest Stocks & Shares Junior ISA Bestinvest  5 5 0 0 5 0 0 5 0 0 0 0 0 0
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley  1 5 5 5 1 5 5 1 5 1 5 5 1 5 5 1 5 5 1 5 5 5 1 5 5	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 0 1 5 0 1 5 5 5 5 5 5 5 6	Redmayne-Bentley Junior ISA Redmayne Bentley  5 5 0 1 5 5 5 0 0 1 1 5 1 1 1 1 1 1 1	Bestinvest Stocks & Shares Junior ISA Bestinvest  5 5 0 5 0 0 5 0 0 0 1 1
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option  Bed and ISA	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley  1 5 5 5 1 5 5 1 5 1 5 0	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 5 0 0 1 1 5 1 1 1 1 1 1 1 1	Redmayne-Bentley Junior ISA Redmayne Bentley  5 5 0 1 5 5 5 0 0 1 1 5 1 1 1 1 1 1 1	Bestinvest Stocks & Shares Junior ISA Bestinvest  5 5 0 5 0 0 5 0 0 0 1 1 1 5
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option  Bed and ISA  Transfers In From Child  Trust Funds  In-Specie Transfers	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley  1 5 5 5 1 5 5 1 5 1 5 5 1 5 5 1 5 5 1 5 5 5 1 5 5	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 0 1 5 5 1	Redmayne-Bentley Junior ISA Redmayne Bentley  5 5 0 1 5 5 5 0 0 1 1 5 1 1 1 1 1 1 1	Bestinvest Stocks & Shares Junior ISA Bestinvest  5 5 0 5 0 0 5 0 0 1 1 1 5 5
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option  Bed and ISA  Transfers In From Child  Trust Funds  In-Specie Transfers  Number of Funds	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley  1 5 5 5 1 5 1 5 1 5 0 5 5 1 5 1 5 5 1 5 5 1 5 5 1 5 5 5 1 5 5 5 5 1 6 6 7 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 0 1 5 5 5 5 5 5 5 5 5 5 5 6 7 7 8 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	Redmayne-Bentley Junior ISA Redmayne Bentley  5 5 0 1 5 5 0 0 1 5 5 5 5 5 5 5 5 5 5	Bestinvest Stocks & Shares Junior ISA Bestinvest  5 5 0 0 0 0 0 1 1 1 5 5 5 5 5 6
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option  Bed and ISA  Transfers In From Child  Trust Funds  In-Specie Transfers  Number of Funds	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley  1 5 5 5 1 5 5 1 5 1 5 6 1 5 6 7 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 0 1 5 5 1	Redmayne-Bentley Junior ISA Redmayne Bentley  5 5 0 1 5 5 0 1 5 5 5 5 5 5 5 5 5 5 5	Bestinvest Stocks & Shares Junior ISA Bestinvest  5 5 0 5 0 0 5 0 0 1 1 1 5 5
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option  Bed and ISA  Transfers In From Child  Trust Funds  In-Specie Transfers  Number of Funds	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley  1 5 5 5 1 5 1 5 1 5 0 5 5 1 5 1 5 5 1 5 5 1 5 5 1 5 5 5 1 5 5 5 5 1 6 6 7 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd  5 5 0 1 5 5 0 0 1 5 5 5 5 1 5 1	Redmayne-Bentley Junior ISA Redmayne Bentley  5 5 0 1 5 5 5 0 0 1 5 5 5 5 5 5 5 5 5	Bestinvest Stocks & Shares Junior ISA Bestinvest  5 5 0 0 0 0 0 1 1 1 5 5 5 5 5 6
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option  Bed and ISA  Transfers In From Child  Trust Funds  In-Specie Transfers  Number of Funds  External Funds	Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley  1 5 5 5 1 5 5 1 5 1 5 5 1 5 5 5 5 5 5	Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd  5  0  1  5  5  0  0  1  5  5  1  5  1  5  5  1	Redmayne-Bentley Junior ISA Redmayne Bentley  5 5 0 1 5 5 0 1 5 5 5 5 5 5 5 5 5 5 5	Bestinvest Stocks & Shares Junior ISA Bestinvest  5 5 0 0 5 0 0 0 0 1 1 1 5 5 5 5 5 5 5

ESG Funds	0	5	0	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	1	1	1	5
ETFs Available	5	0	5	5
Investment Trusts	5	5	5	5
Income Options Available	1	0	0	0
Auto Portfolio Rebalancing	1	1	1	1
Total	83	81	80	79
	CMC Invest Stocks & Shares ISA CMC Invest	<b>Dodl Investment ISA</b> AJ Bell Dodl	<b>Cushon Junior ISA</b> NatWest Cushon	<b>My Wealth ISA</b> Wealth at Work Limited
Junior ISA	1	1	5	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	5	1	0	1
Online Applications	5	5	5	5
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	1	5	5	5
Additional Permitted Subscriptions	5	5	0	5
APS Transfers In Allowed	5	0	0	5
Phased Investment Option	0	1	1	1
Bed and ISA	0	1	1	1
Transfers In From Child Trust Funds	0	0	5	0
In-Specie Transfers	5	5	1	1
Number of Funds	5	4	5	3
External Funds	5	5	5	5
Life Funds	0	1	1	1
Passive/Index Funds	0	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	0	1	5	1
ETFs Available	5	4	1	5
Investment Trusts	5	1	1	1
Income Options Available	0	1	0	0
Auto Portfolio Rebalancing	1	1	1	1
Total	79	78	78	78
	M&G Stocks & Shares ISA M&G Securities Ltd	Vanguard Junior ISA Vanguard Asset Management	Stocks & Shares ISA Invesco	Killik & Co Junior Stocks & Shares ISA KILLIK & Co
Junior ISA	1	5	1	5
Platform/Self Select ISA	1	5	1	5
Flexible ISA	1	0	1	0
Online Applications	5	5	1	1
Online Valuations	5	5	5	0
Online Contribution History	0	0	5	0
Online Transaction History	5	5	5	0
History			5	

Regular Premiums				
L	5	5	5	5
Additional Permitted	5	0	5	0
Subscriptions				
APS Transfers In Allowed	5	0	5	0
Phased Investment Option	1	5	1	1
Bed and ISA	5	0	1	5
Transfers In From Child Trust Funds	0	1	0	5
In-Specie Transfers	5	1	5	0
Number of Funds	3	4	3	5
External Funds	1	1	1	5
Life Funds	1	1	1	1
Passive/Index Funds	5	5	5	5
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	1	5	1	5
ETFs Available	1	5	1	4
Investment Trusts	1	1	1	5
Income Options Available	1	0	3	0
Auto Portfolio Rebalancing	1	0	1	1
Total		74	73	73
Total			Close Stocks & Shares ISA	
	Select ISA	ISA	Close Asset Management	InvestEngine ISA
	NFU Mutual		Ltd	InvestEngine (UK) Limited
Junior ISA	1	5	1	1
Platform/Self Select ISA	1	5	5	5
Flexible ISA	1	0	1	1
Online Applications				
	1	1	5	5
Online Valuations	<b>1 5</b>	1 5	5 5	5
Online Valuations		5		5
Online Valuations Online Contribution	5	5	5	5
Online Valuations Online Contribution History	5 5	5	5	5
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted	5 5	5 0 0	5 0 5	5 5
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions	5 5 5 5	5 0 0 5 0	5 0 5 5	5 5 5 5
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed	5 5 5 5 5 5	5 0 0 5 0	5 0 5 5 5	5 5 5 5 0
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option	5 5 5 5 5 5	5 0 0 5 0 0	5 0 5 5 5 5	5 5 5 5 0 0
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA	5 5 5 5 5 5	5 0 0 5 0	5 0 5 5 5	5 5 5 5 0
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child	5 5 5 5 5 5	5 0 0 5 0 0	5 0 5 5 5 5	5 5 5 5 0 0
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds	5 5 5 5 5 5 1 1	5 0 0 5 0 0 0 1 1 1	5 0 5 5 5 5 1 1	5 5 5 5 0 0 0 5 5
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers	5 5 5 5 5 5 1 1 0 5	5 0 0 5 0 0 0 1 1 1 5 5	5 0 5 5 5 5 1 1 0	5 5 5 5 0 0 0 5 5
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds	5 5 5 5 5 5 1 1 1 0 5	5 0 0 5 0 0 1 1 1 5 5	5 0 5 5 5 5 1 1 1 0	5 5 5 0 0 0 5 5 0
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds	5 5 5 5 5 5 1 1 1 0 5 2	5 0 0 5 0 0 0 1 1 1 5 5 5 5	5 0 5 5 5 5 1 1 1 0 5 0	5 5 5 5 0 0 0 5 5 5 0
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds	5 5 5 5 5 5 1 1 1 0 5 2 5	5 0 0 5 0 0 0 1 1 1 5 5 5 5	5 0 5 5 5 5 1 1 0 5 0 5	5 5 5 5 0 5 5 5 5 1 1 1 1 1 1 1 1 1 1 1
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds	5 5 5 5 5 5 1 1 1 0 5 2 5 1 1	5 0 0 5 0 0 0 1 1 1 5 5 5 5 5	5 0 5 5 5 1 1 0 5 0 5 1 1 1 0 5 1 5 1 5	5 5 5 6 7 7 8 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds Ethical Funds	5 5 5 5 5 5 5 1 1 1 1 5 5 5 5 5 1 1 1 1	5 0 0 0 5 0 0 1 1 1 5 5 5 5 5 1	5 0 5 5 5 5 1 1 0 5 0 5 1 1 5 0 5 0 5	5 5 5 0 0 0 5 5 5 1 1 1 1 1 1 1 1 1 1 1
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds Ethical Funds Ethical Funds	5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 0 0 0 5 0 1 1 1 5 5 5 5 5 5 5 5 5 5 5	5 0 5 5 5 5 1 1 0 5 0 5 1 1 0 5 0 0 5 0 0 0	5 5 5 5 5 5 5 5 5 5 5 1 1 1 1 1 1 1 1 1
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds Ethical Funds ESG Funds Unit Trusts/OEICs	5 5 5 5 5 5 1 1 1 0 5 2 5 1 1 1 5 5 5	5 0 0 0 5 0 1 1 1 5 5 5 5 5 5 5 5 5 5 5	5 0 5 5 5 5 1 1 1 0 5 0 5 0 0 5 0 0 5 1 5 0 0 0 5	5 5 5 6 7 7 8 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds Ethical Funds ESG Funds Unit Trusts/OEICs Funds Non-UK	5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 0 0 0 5 0 0 0 1 1 1 5 5 5 5 5 5 5 5 5	5 0 5 5 5 5 1 1 1 0 5 0 5 0 5 0 5 0 5 1 5 5 1 5 5 7 7 8 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8	5 5 5 5 5 5 5 5 5 1 1 1 1 1 1 1 1 1 1 1
Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds Ethical Funds ESG Funds Unit Trusts/OEICs	5 5 5 5 5 5 1 1 1 0 5 2 5 1 1 1 5 5 5	5 0 0 0 5 0 1 1 1 5 5 5 5 5 5 5 5 5 5 5	5 0 5 5 5 5 1 1 1 0 5 0 5 0 0 5 0 0 5 1 5 0 0 0 5	5 5 5 6 7 7 8 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8

Income Options Available	3	lo	О	1
Auto Portfolio Rebalancing		1	1	5
	- 72	71	71	71
	M&G Stocks and Shares	Stocks & Shares ISA	My Choice (ISA)	Children's ISA Ethical
	Junior ISA	Chip	Scottish Friendly	Option The Children's ISA Limited
	M&G Securities Ltd	  -	  -	The Children's ISA Limited
Junior ISA Platform/Self Select ISA	5 1	1	1	5
,	0	5	1	0
	5	5	5	5
	5	5	5	5
Online Contribution	5	) 	) I	5
	0	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	0	0	5	0
APS Transfers In Allowed	0	0	5	0
Phased Investment Option	1	1	1	1
Bed and ISA	5	1	1	1
Transfers In From Child Trust Funds	5	0	0	5
	5	1	1	5
Number of Funds	3	2	2	1
External Funds	1	5	1	5
Life Funds	1	1	5	1
Passive/Index Funds	5	5	5	1
Ethical Funds	5	5	5	5
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5	5	1	5
Funds Non-UK	1	1	1	1
ETFs Available	1	4	1	1
Investment Trusts	1	1	1	1
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	1	1	1	0
Total	71	70	69	69
	shareDeal active Junior ISA Jarvis Investment Management	<b>Prudential ISA</b> Prudential	Stocks and Shares ISA Legal & General	<b>My Select Junior ISA</b> Scottish Friendly
Junior ISA	5	1	1	5
Platform/Self Select ISA	5	1	1	1
Flexible ISA	0	1	1	0
Online Applications	5	5	5	5
Online Valuations	0	5	5	5
Online Contribution History	0	5	5	5
Online Transaction History	0	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	0	5	1	0
	0	5	1	0

Phased Investment Option	1	1	1	1
Bed and ISA	5	5	<u> -</u>  1	1
Transfers In From Child	<u> </u>	5	1	1
Trust Funds	5	0	0	5
In-Specie Transfers	5	1	5	1
Number of Funds	5	2	3	2
External Funds	5	1	1	1
Life Funds	1	1	1	5
Passive/Index Funds	5	5	5	5
Ethical Funds	0	1	5	5
ESG Funds	0	1	5	5
Unit Trusts/OEICs	5	5	5	1
Funds Non-UK	1	1	1	1
ETFs Available	4	1	1	1
Investment Trusts	5	1	1	1
Income Options Available	0	3	1	0
Auto Portfolio Rebalancing	1	1	1	1
Total	68	68	67	67
	Workplace ISA Legal & General (Portfolio	Plum ISA	X-O.CO.UK ISA Jarvis Investment	Quilter Cheviot Ltd ISA
	Mgt Services)	Plum	Management	Quilter Cheviot
Junior ISA	1	1	1	1
Platform/Self Select ISA	1	1	5	1
Flexible ISA	1	1	1	5
Online Applications	5	5	5	1
Online Valuations	5	5	0	5
Online Contribution History	5	5	0	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	1	5
Additional Permitted Subscriptions	1	0	5	5
APS Transfers In Allowed	1	0	5	5
Phased Investment Option	1	0	1	5
Bed and ISA	1	1	5	5
Transfers In From Child Trust Funds	0	0	0	0
In-Specie Transfers	5	5	5	5
	3	3	5	5
External Funds	1	5		0
Life Funds	1	1		0
Passive/Index Funds	5	5		0
Ethical Funds	5	5		0
ESG Funds	5	5		0
Unit Trusts/OEICs	5	5		0
Funds Non-UK	1	1	1	0
ETFs Available	1	1		0
Investment Trusts	1	1	5	0
	0	0	0	5
		0	1	1
Auto Portfolio Rebalancing		0		1 <b>64</b>

	My Ethical Choice ISA Scottish Friendly	<b>Trading 212 ISA</b> Trading 212	X-O.CO.UK Junior ISA Jarvis Investment Management	Select Junior ISA NFU Mutual
Junior ISA	1	1	5	5
Platform/Self Select ISA	1	1	5	1
Flexible ISA	1	5	0	0
Online Applications	5	5	5	1
Online Valuations	5	5	0	5
Online Contribution	E	5		
History			ľ	7
Online Transaction History		5	5	5
Regular Premiums	5	1	1	5
Additional Permitted Subscriptions	5	5	0	0
APS Transfers In Allowed	1	5	0	0
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	5	1
Transfers In From Child Trust Funds	0	0	5	5
In-Specie Transfers	1	5	5	1
Number of Funds	1	5	5	2
External Funds	1	1	5	5
Life Funds	5	1	1	1
Passive/Index Funds	5	1	1	1
Ethical Funds	5	1	1	5
ESG Funds	5	1	1	5
Unit Trusts/OEICs	1	1	1	5
Funds Non-UK	1	1	1	1
ETFs Available	1	5	4	1
Investment Trusts	1	1	5	1
	0	0	0	0
Auto Portfolio Rebalancing		1	1	1
Total	64	64	63	63
	Children's ISA Actively Managed Option The Children's ISA Limited	<b>Beanstalk Junior ISA</b> Beanstalk	CT ISA (Investment Trust) Columbia Threadneedle Investments	Investec AIM Portfolio IHT Plan ISA Investec Wealth & Investment (UK)
Junior ISA	5	5	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	0	5	5
Online Applications	5	5	5	1
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	1
Additional Permitted Subscriptions	0	0	5	5
APS Transfers In Allowed	0	0	5	5
Phased Investment Option	1	1	1	5
Bed and ISA	1	1	1	5
Transfers In From Child	5	5	0	0

Trust Funds				
	5	<u> </u>	<u> </u>	5
In-Specie Transfers	2	1	2	
Number of Funds			<sup>2</sup>	3
External Funds	5	5	1	1
Life Funds	1	1	1	1
Passive/Index Funds	1	5	1	1
Ethical Funds	1	1	1	1
ESG Funds	1	1	1	1
Unit Trusts/OEICs	5	5	1	1
Funds Non-UK	1	1	1	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	5	1
Income Options Available	0	0	1	0
Auto Portfolio Rebalancing	1	1	1	1
Total	63	62	62	62
	Jupiter ISA	Ninety One ISA	Children's ISA Low Cost	Bank of Scotland Ready
	Jupiter Asset Management		<b>Option</b> The Children's ISA Limited	Made Investments ISA
L c'ación		4	The Children's ISA Limited	Bank of Scotland
Junior ISA	1	1	5	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	0	5
Online Applications	1	1	5	5
Online Valuations	5	5	5	5
Online Contribution	0	0	5	5
History	_	_	_	_
Online Transaction History		5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	5	o	5
APS Transfers In Allowed	5	5	0	5
Phased Investment Option	1	1	1	1
Bed and ISA	5	1	1	1
Transfers In From Child Trust Funds	0	0	5	0
	1	5	5	1
In-Specie Transfers	3			
Number of Funds	I .	3	5	1
External Funds	1	1		
Life Funds	1	1	1	1
Passive/Index Funds	1	1	1	1
Ethical Funds	5	5	14	1
ESG Funds	5	5	5	5
Unit Trusts/OEICs	5		]	
Funds Non-UK	1	1	ı,	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	1	1
	1	1	0	1
Auto Portfolio Rebalancing		1	1	1
Total	62	62		61
	CT ISA (Unit Trust/OEIC) Columbia Threadneedle Investments	Stakeholder Junior ISA Forester Life Ltd	Halifax Ready Made Investments ISA Halifax	Lloyds Bank Ready Made Investment ISA Lloyds Bank
Junior ISA	1	5	1	1

Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	0	5	5
Online Applications	1	5	5	5
Online Valuations	5	5	5	5
Online Contribution			<u> </u>	
History	0	5	5	5
Online Transaction History	0	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	0	5	5
APS Transfers In Allowed	5	0	5	5
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	0	5	0	0
In-Specie Transfers	1	1	1	1
Number of Funds	3	1	1	1
External Funds	1	1	1	1
Life Funds	1	5	1	1
Passive/Index Funds	5	1	1	1
Ethical Funds	5	5	1	1
ESG Funds	5	5	1	1
Unit Trusts/OEICs	5	1	5	5
Funds Non-UK	1	1	1	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	1	1
Income Options Available	5	0	1	1
Auto Portfolio Rebalancing	1	0	1	1
Total	61	61	61	61
	Pilling Stocks & Shares		M. Fibial Calcut Lades	Object to the Charles
	Junior ISA Managed	Junior Shariah ISA	My Ethical Select Junior ISA	Children's ISA Shariah Option
	Pilling & Co Stockbrokers Ltd	Red Rose Friendly Society	Scottish Friendly	The Children's ISA Limited
Junior ISA	Pilling & Co Stockbrokers Ltd	Red Rose Friendly Society 5		
Junior ISA Platform/Self Select ISA	Pilling & Co Stockbrokers Ltd		Scottish Friendly	The Children's ISA Limited
	Pilling & Co Stockbrokers Ltd 5	5	Scottish Friendly	The Children's ISA Limited
Platform/Self Select ISA	Pilling & Co Stockbrokers Ltd 5	5	Scottish Friendly 5	The Children's ISA Limited  5
Platform/Self Select ISA Flexible ISA	Pilling & Co Stockbrokers Ltd 5 1	5 1 0	Scottish Friendly  5  1  0	The Children's ISA Limited  5  1
Platform/Self Select ISA Flexible ISA Online Applications	Pilling & Co Stockbrokers Ltd 5 1 0	5 1 0 5	Scottish Friendly  5  1  0  5	The Children's ISA Limited  5 1 0 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History	Pilling & Co Stockbrokers Ltd  5 1 0 1 5 5	5 1 0 5 5	Scottish Friendly  5  1  0  5	The Children's ISA Limited  5 1 0 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	Pilling & Co Stockbrokers Ltd  5 1 0 1 5 5	5 1 0 5 5	Scottish Friendly  5  1  0  5  5	The Children's ISA Limited  5 1 0 5 5 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History	Pilling & Co Stockbrokers Ltd  5 1 0 1 5 5 5 5 5	5 1 0 5 5 1 1 1 5	Scottish Friendly  5  1  0  5  5  5  5	The Children's ISA Limited  5 1 0 5 5 5 5 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums	Pilling & Co Stockbrokers Ltd  5 1 0 1 5 5 5 5	5 1 0 5 5 1	Scottish Friendly  5  1  0  5  5  5	The Children's ISA Limited  5 1 0 5 5 5 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted	Pilling & Co Stockbrokers Ltd  5 1 0 1 5 5 5 5 5	5 1 0 5 5 1 1 1 5	Scottish Friendly  5  1  0  5  5  5  5	The Children's ISA Limited  5 1 0 5 5 5 5 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions	Pilling & Co Stockbrokers Ltd  5 1 0 1 5 5 5 0 0	5 1 0 5 5 1 1 1 5	Scottish Friendly  5  1  0  5  5  5  6  7  7  8  8  8  8  8  9  9  9  9  9  9  9  9	The Children's ISA Limited  5 1 0 5 5 5 5 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed	Pilling & Co Stockbrokers Ltd  5 1 0 1 5 5 5 0 0	5 1 0 5 5 5 1 1 1 5 0	Scottish Friendly  5  1  0  5  5  5  0  0	The Children's ISA Limited  5 1 0 5 5 5 5 0 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option	Pilling & Co Stockbrokers Ltd  5 1 0 1 5 5 5 0 0 1	5 1 0 5 5 5 1 1 1 5 0 0	Scottish Friendly  5  1  0  5  5  5  0  0  1	The Children's ISA Limited  5 1 0 5 5 5 6 0 0 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child	Pilling & Co Stockbrokers Ltd  5 1 0 1 5 5 5 0 0 1	5 1 0 5 5 5 1 1 1 5 0 0	Scottish Friendly  5  1  0  5  5  5  0  0  1	The Children's ISA Limited  5 1 0 5 5 5 6 0 0 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds	Pilling & Co Stockbrokers Ltd  5 1 0 1 5 5 5 0 0 1 5 5 5 5 5 5 5 5 6 7 7 8 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	5 1 0 5 5 5 1 1 1 5 0 0	Scottish Friendly  5  1  0  5  5  5  0  0  1  1  1  5	The Children's ISA Limited  5 1 0 5 5 5 5 0 0 1 1 1 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers	Pilling & Co Stockbrokers Ltd  5 1 0 1 5 5 5 0 0 1 1 5 1 1 1 1 1 1 1	5 1 0 5 5 1 1 1 1 5 0 0 1 1 1 5 1 1	Scottish Friendly  5  1  0  5  5  5  0  0  1  1  1  1	The Children's ISA Limited  5 1 0 5 5 5 6 0 0 1 1 1 5 5 5 5

	I.	I.	L	
Life Funds	1	1	5	1
Passive/Index Funds	5	5	1	1
Ethical Funds	1	5	5	1
ESG Funds	1	5	5	1
Unit Trusts/OEICs	5	5	1	1
Funds Non-UK	1	1	1	5
ETFs Available	1	1	1	1
Investment Trusts	1	1	1	1
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	0	0	0	0
Total	61	61	61	61
	Beanstalk ISA	Investments ISA	Stakeholder ISA	Investment ISA
	Beanstalk	Monzo	Forester Life Ltd	Freetrade
Junior ISA	1	1	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	5	0	1	5
Online Applications	5	5	5	5
Online Valuations	5	5	5	5
Online Contribution	5	5	5	5
History			<u> </u>	
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	1
Additional Permitted	1	0	5	0
Subscriptions				
APS Transfers In Allowed	1	0	1	0
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child	0	0	0	0
Trust Funds				
In-Specie Transfers	1	5	1	5
Number of Funds	1	1	1	5
External Funds	5	5	1	1
Life Funds	1	1	5	1
Passive/Index Funds	5	1	1	1
Ethical Funds	1	5	5	1
ESG Funds	1	5	5	1
Unit Trusts/OEICs	5	5	1	1
Funds Non-UK	1	1	1	1
ETFs Available	1	1	1	5
Investment Trusts	1	1	1	5
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	1	0	0	1
Total	60	60	59	58
	Stellar AIM IHT Service Stellar Asset Management Ltd	Artemis ISA Artemis Fund Managers Ltd	Charles Stanley Direct ISA Charles Stanley & Co Ltd	Stocks & Shares ISA IG Trading and Investments Ltd
Junior ISA	1	1	1	1
Platform/Self Select ISA	5	1	5	5
Flexible ISA	1	1	5	5
Online Applications	1	1	5	5
Online Valuations	5	5	5	5

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Online Contribution	5	5	0	0
History	_	_		-
Online Transaction History		5	0	0
Regular Premiums	1	5	5	1
Additional Permitted Subscriptions	5	5	0	0
APS Transfers In Allowed	5	5	0	1
Phased Investment Option	1	1	0	1
Bed and ISA	5	5	5	5
Transfers In From Child Trust Funds	0	0	0	0
In-Specie Transfers	5	1	0	5
Number of Funds	3	2	5	5
External Funds	1	1	5	1
Life Funds	1	1	1	1
Passive/Index Funds	1	1	0	1
Ethical Funds	1	1	0	1
ESG Funds	1	1	0	1
Unit Trusts/OEICs	1	5	5	1
Funds Non-UK	1	1	0	1
ETFs Available	1	1	5	5
Investment Trusts	1	1	5	5
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing		1	0	1
Total	58	57	57	57
	Virgin Money Stocks and	Wesleyan Unit Trust ISA	Charles Stanley Direct	
	Shares ISA		Junior ISA	OneFamily Junior ISA
	Shares ISA Virgin Money			OneFamily Junior ISA OneFamily
Junior ISA		Wesleyan Unit Trust Mgrs	Junior ISA	
Junior ISA Platform/Self Select ISA	Virgin Money	Wesleyan Unit Trust Mgrs Ltd	Junior ISA	OneFamily
	Virgin Money 1	Wesleyan Unit Trust Mgrs Ltd 1	Junior ISA Charles Stanley & Co Ltd 5 5	OneFamily 5
Platform/Self Select ISA	Virgin Money  1  1	Wesleyan Unit Trust Mgrs Ltd 1	Junior ISA Charles Stanley & Co Ltd 5 5	OneFamily 5 1
Platform/Self Select ISA Flexible ISA	Virgin Money  1  1	Wesleyan Unit Trust Mgrs Ltd 1 1	Junior ISA Charles Stanley & Co Ltd 5 5	OneFamily 5 1
Platform/Self Select ISA Flexible ISA Online Applications	Virgin Money  1  1  5	Wesleyan Unit Trust Mgrs Ltd 1 1 5 5	Junior ISA Charles Stanley & Co Ltd 5 5	OneFamily 5 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations	Virgin Money  1  1  5	Wesleyan Unit Trust Mgrs Ltd 1 1 5	Junior ISA Charles Stanley & Co Ltd 5 5	OneFamily 5 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	Virgin Money  1  1  5  5	Wesleyan Unit Trust Mgrs Ltd 1 1 5 5	Junior ISA Charles Stanley & Co Ltd 5 5 0 5 0	OneFamily 5 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History	Virgin Money  1  1  5  5	Wesleyan Unit Trust Mgrs Ltd  1  1  5  5  5	Junior ISA Charles Stanley & Co Ltd 5 5 0 5 0	OneFamily  5 1 0 5 5 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History	Virgin Money  1  1  5  5  5	Wesleyan Unit Trust Mgrs Ltd  1  1  5  5  5	Junior ISA Charles Stanley & Co Ltd  5  0  5  0  0  0	OneFamily  5  1  0  5  5  0  0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted	Virgin Money  1  1  5  5  5	Wesleyan Unit Trust Mgrs Ltd  1  1  5  5  5  5	Junior ISA Charles Stanley & Co Ltd  5  0  5  0  0  0	OneFamily  5  1  0  5  5  0  0  5  1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions	Virgin Money  1  1  1  5  5  5  5  5  5  5	Wesleyan Unit Trust Mgrs Ltd  1  1  5  5  5  5  5	Junior ISA Charles Stanley & Co Ltd  5  5  0  5  0  5  0  0  0  5	OneFamily  5  1  0  5  5  0  0  0  5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed	Virgin Money  1  1  1  5  5  5  5  5  5  5	Wesleyan Unit Trust Mgrs Ltd  1  1  5  5  5  5  5  5  5	Junior ISA Charles Stanley & Co Ltd  5  5  0  5  0  5  0  0  0  0	OneFamily  5  1  0  5  5  0  0  0  0  0  0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option	Virgin Money  1  1  1  5  5  5  5  5  1	Wesleyan Unit Trust Mgrs Ltd  1  1  5  5  5  5  5  1	Junior ISA Charles Stanley & Co Ltd 5 5 0 5 0 5 5 0 0 0 0 0 0 0	OneFamily  5  1  0  5  5  0  0  0  1
Platform/Self Select ISA Flexible ISA Online Applications Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child	Virgin Money  1  1  1  5  5  5  5  1  1	Wesleyan Unit Trust Mgrs Ltd  1  1  1  5  5  5  5  1  1  1  1  1	Junior ISA Charles Stanley & Co Ltd 5 5 0 5 0 5 5 0 0 0 0 0 0 0	OneFamily  5  1  0  5  5  0  0  0  1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds	Virgin Money  1  1  1  5  5  5  5  1  1  0	Wesleyan Unit Trust Mgrs Ltd  1  1  1  5  5  5  5  1  1  1  1  0	Junior ISA Charles Stanley & Co Ltd  5  5  0  5  0  5  0  0  0  5  0  0  5  0  0	OneFamily  5  1  0  5  5  0  0  0  1  1  1  5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers	Virgin Money  1  1  1  5  5  5  5  1  1  1  1  1  1	Wesleyan Unit Trust Mgrs Ltd  1  1  1  5  5  5  5  1  1  1  1  1  1	Junior ISA Charles Stanley & Co Ltd 5 5 0 0 5 0 0 5 0 0 0 0 0 0 0 0 0 0 0	OneFamily  5  1  0  5  5  0  0  1  1  1  1  5  1
Platform/Self Select ISA Flexible ISA Online Applications Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds	Virgin Money  1  1  1  5  5  5  5  1  1  0  1  1  1	Wesleyan Unit Trust Mgrs Ltd  1  1  1  5  5  5  5  1  1  1  0  1  2	Junior ISA Charles Stanley & Co Ltd  5  5  0  5  0  0  0  0  5  0  0  0  5  0  0	OneFamily  5  1  0  5  5  0  0  1  1  1  5  1  1  1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds	Virgin Money  1  1  1  5  5  5  5  1  1  1  1  1  1	Wesleyan Unit Trust Mgrs Ltd  1  1  1  5  5  5  5  1  1  1  1  2  1	Junior ISA Charles Stanley & Co Ltd  5  5  0  5  0  0  0  0  0  0  0  0  5  0  5  0  5  5	OneFamily  5  1  0  5  5  0  0  0  1  1  1  1  1
Platform/Self Select ISA Flexible ISA Online Applications Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds	Virgin Money  1  1  1  5  5  5  5  1  1  1  1  1  1	Wesleyan Unit Trust Mgrs Ltd  1  1  1  5  5  5  5  1  1  1  1  2  1  1	Junior ISA Charles Stanley & Co Ltd  5  5  0  5  0  5  0  0  0  5  0  0  5  0  0	OneFamily  5  1  0  5  5  0  0  1  1  1  1  1  1  1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds	Virgin Money  1  1  1  5  5  5  5  1  1  1  1  1  1	Wesleyan Unit Trust Mgrs Ltd  1  1  1  5  5  5  5  1  1  1  0  1  2  1  1  1	Junior ISA Charles Stanley & Co Ltd  5  5  0  5  0  0  0  5  0  0  5  0  0	OneFamily  5  1  0  5  5  0  0  1  1  1  1  1  1  1  5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds Ethical Funds	Virgin Money  1  1  1  5  5  5  5  1  1  1  1  1  1	Wesleyan Unit Trust Mgrs Ltd  1  1  1  5  5  5  5  1  1  1  1  2  1  1  1  1  1  1  1	Junior ISA Charles Stanley & Co Ltd  5  5  0  5  0  0  0  0  0  0  0  5  0  1  0  0  0  0  0  0  0  0  0  0  0	OneFamily  5  1  0  5  5  0  0  0  1  1  1  1  1  1  5  5  5

Funds Non-UK	1	1	0	1
ETFs Available	1	1	5	1
Investment Trusts	1	1	5	1
Income Options Available	1	0	0	0
Auto Portfolio Rebalancing		1	0	1
	57	57	-	56
Total	Post Office Junior ISA Post Office Money	Shariah ISA Red Rose Friendly Society	CT Junior ISA (Investment Trust) Columbia Threadneedle Investments	Premier Miton ISA Premier Miton Investors
Junior ISA	5	1	5	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	1	0	1
Online Applications	5	5	5	1
Online Valuations	5	5	5	5
Online Contribution History	5	1	5	1
Online Transaction History	5	1	5	1
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	0	1	0	5
APS Transfers In Allowed	0	1	0	5
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	5	0	5	0
In-Specie Transfers	0	1	1	1
Number of Funds	1	1	2	3
External Funds	5	5	1	1
Life Funds	1	1	1	1
Passive/Index Funds	1	5	1	1
Ethical Funds	1	5	1	5
ESG Funds	1	5	1	5
Unit Trusts/OEICs	5	5	1	5
Funds Non-UK	1	1	1	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	5	1
Income Options Available	0	0	0	1
Auto Portfolio Rebalancing	0	1	1	1
_	56	56	55	55
	ISA		Schroders Stocks & Shares	
	Waystone Management	Stocks & Shares ISA	ISA	EdenTree Investment
	(UK) Limited	McInroy & Wood	Schroder UTs Ltd	Management Ltd
Junior ISA	1	1	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	1	5
Online Applications	1	1	1	1
Online Valuations	0	5	1	1
Online Contribution History	0	0	1	1
Online Transaction History	0	5	1	1
		5	5	

Additional Permitted				
Subscriptions	5	5	5	5
APS Transfers In Allowed	5	5	1	5
Phased Investment Option		1	<u> </u>	1
Bed and ISA	<u> </u>	5	1	1
	<u> </u>	) 	<u> </u>	1
Transfers In From Child Trust Funds	0	0	0	0
In-Specie Transfers	0	1	1	1
Number of Funds	4	1	4	2
External Funds	5	1	1	1
Life Funds	1	1	1	1
Passive/Index Funds	5	1	1	1
Ethical Funds	5	1	5	5
ESG Funds	5	1	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	1	1	1	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	5	1
	0	3		0
Auto Portfolio Rebalancing		1	1	1
Total	55	54		53
Total		Fundamental AIM IHT ISA		
	Shariah Junior ISA	(Direct)	Quilter Cheviot Ltd Junior	Stocks & Shares ISA
	Forester Life Ltd	Fundamental Asset	ISA	Triodos Bank
		Management	Quilter Cheviot	
Junior ISA	5	1	5	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	5	0	1
Online Applications	5	5	1	5
Online Valuations	5	5	5	5
Online Contribution	_	_		
History	5	5	5	0
Online Transaction History	5	5	5	0
Regular Premiums	5	1	5	5
Additional Permitted		-		0
Subscriptions	0	5	U	0
APS Transfers In Allowed	0	0	0	1
Phased Investment Option	1	1	5	5
Bed and ISA	1	1	5	5
Transfers In From Child	5	0	c	0
Trust Funds	3	O		U
In-Specie Transfers	1	5	5	1
Number of Funds	_			
Number of Funds	1	3	5	1
External Funds			5	1
	1	3	1	
External Funds	1	1	0	1
External Funds Life Funds	1 1 5	3 1 1	0	1
External Funds Life Funds Passive/Index Funds	1 1 5 1	3 1 1 1	0 0 0	1 1 1
External Funds Life Funds Passive/Index Funds Ethical Funds ESG Funds	1 1 5 1	3 1 1 1 1	0 0 0 0	1 1 1 5
External Funds Life Funds Passive/Index Funds Ethical Funds	1 1 5 1 1 1	3 1 1 1 1 1	0 0 0 0	1 1 1 5 5
External Funds Life Funds Passive/Index Funds Ethical Funds ESG Funds Unit Trusts/OEICs Funds Non-UK	1 1 5 1 1 1 1	3 1 1 1 1 1 1 1	0 0 0 0 0 0	1 1 1 5 5 1
External Funds Life Funds Passive/Index Funds Ethical Funds ESG Funds Unit Trusts/OEICs	1 1 5 1 1 1	3 1 1 1 1 1 1	0 0 0 0 0	1 1 1 5 5

Income Options Available	0	0	lo	0
Auto Portfolio Rebalancing		1	1	1
		53	53	53
Total	Unicorn ISA	Stocks & Shares ISA		Margetts Junior ISA
	Unicorn Asset	BNY Mellon Fund	Liontrust ISA	Margetts Fund
	Management	Managers Ltd		Management Ltd
Junior ISA	1	1	1	5
Platform/Self Select ISA	1	1	1	1
Flexible ISA	5	1	1	0
Online Applications	1	5	1	1
Online Valuations	1	5	0	5
Online Contribution	1			Г
History	1	0	0	5
Online Transaction History	1	5	0	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	1	5	0
APS Transfers In Allowed	5	1	5	0
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	0	0	0	5
In-Specie Transfers	1	0	1	1
Number of Funds	2	3	4	3
External Funds	1	1	1	1
Life Funds	1	1	1	1
Passive/Index Funds	1	1	5	1
Ethical Funds	5	5	5	1
ESG Funds	5	5	5	1
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	1	1	1	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	1	1
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	1	1	1	1
Total	53	52	52	52
	NatWest Invest Junior ISA NatWest	RBS Invest Junior ISA Royal Bank of Scotland	<b>Wesleyan With Profits ISA</b> Wesleyan Assurance Society	<b>Shariah ISA</b> Forester Life Ltd
Junior ISA	5	5	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	0	1	1
Online Applications	5	5	5	5
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	0	0	5	5
APS Transfers In Allowed	0	0	5	1
Phased Investment Option	-	0	1	1

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Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	5	5	0	0
	1	4	<u> </u>	1
In-Specie Transfers  Number of Funds		1	1	1
	1	1	1  -	1
External Funds	1	1	1.	1
Life Funds	1	1	1.	5
Passive/Index Funds	1	1	1	1
Ethical Funds	1	1	1	1
ESG Funds	1	1	1	1
Unit Trusts/OEICs	1	1	1	1
Funds Non-UK	5	5	1	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	1	1
Income Options Available	0	0	1	0
Auto Portfolio Rebalancing		0	0	0
Total	52	52		51
	Fundsmith ISA Fundsmith LLP	Margetts ISA Margetts Fund Management Ltd	<b>My Easy Choice (ISA)</b> Scottish Friendly	Wesleyan Unit Trust Junior ISA Wesleyan Unit Trust Mgrs Ltd
Junior ISA	1	1	1	5
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	1	0
Online Applications	5	1	5	1
Online Valuations	1	5	5	5
Online Contribution History	1	5	5	5
Online Transaction History	1	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	5	5	0
APS Transfers In Allowed	5	1	5	0
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	0	0	0	5
In-Specie Transfers	1	1	1	1
Number of Funds	1	4	1	2
External Funds	1	1	1	1
Life Funds	1	1	1	1
Passive/Index Funds	1	1	1	1
Ethical Funds	5	1	1	1
ESG Funds	5	1	1	1
Unit Trusts/OEICs	5	5	1	5
Funds Non-UK	1	1	1	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	1	1
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing		1	0	1
			51	51

	AXA Stocks and Shares			Henderson Investment
	ISA	Shepherds Junior ISA	Fundsmith Junior ISA	Funds ISA
	AXA Investment Managers UK Ltd	Shepherds Friendly Society	Fundsmith LLP	Janus Henderson Investors
Junior ISA	1	5	5	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	0	0	1
Online Applications	1	5	5	1
Online Valuations	1	5	1	5
	1		i i	5
Online Contribution History	1	5	1	0
Online Transaction History	1	5	1	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	0	0	1
APS Transfers In Allowed	5	0	0	1
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	0	5	5	0
In-Specie Transfers	1	1	1	1
Number of Funds	3	1	1	3
External Funds	1	1	1	1
Life Funds	1	1	1	1
Passive/Index Funds	1	1	1	1
Ethical Funds	5	1	5	5
ESG Funds	5	1	5	5
Unit Trusts/OEICs	5	1	5	5
Funds Non-UK	1	1	1	1
ETFs Available	1	1	1	1
Investment Trusts				
	1	1	1	1
	0	0	0	0
Auto Portfolio Rebalancing		1	0	1
Total	50	50	49	49
	Stocks & Shares ISA LV=	Marks & Spencer Stocks and Shares ISA M&S Bank	<b>ESG ISA</b> Red Rose Friendly Society	St James Place ISA St. James's Place UT Group Ltd
Junior ISA	1	1	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	1	0
Online Applications	5	1	5	1
Online Valuations	5	1	5	0
Online Contribution		4		
History	) 	1	0	0
Online Transaction History	5	1	0	0
Regular Premiums	1	5	5	5
Additional Permitted Subscriptions	5	5	5	5
APS Transfers In Allowed	5	5	5	5
Phased Investment Option	1	1	1	1
Bed and ISA	1	5	1	1
Transfers In From Child	0	0	0	0

Trust Funds				
In-Specie Transfers	1	1	1	1
	1	1		1
Number of Funds	1	1	1	3
External Funds	1	1	1	1
Life Funds	1	1	1	1
Passive/Index Funds	1	5	1	1
Ethical Funds	1	1	5	5
ESG Funds	1	1	5	5
Unit Trusts/OEICs	1	5	1	5
Funds Non-UK	1	1	1	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	1	1
•	1	1	0	3
Auto Portfolio Rebalancing	1	1	0	1
Total	49	49	49	49
	DIY ISA	Stocks and Shares Junior	Junior ESG ISA	Unicorn JISA
	Moneyfarm	<b>ISA</b> NuWealth	Red Rose Friendly Society	Unicorn Asset Management
Junior ISA	1	5	5	5
Platform/Self Select ISA	1	<u>                                     </u>	1	1
Flexible ISA	5	0	0	0
Online Applications	5	5	5	1
Online Valuations	0	5	5	1
Online Contribution			<u> </u>	_
History	0	5	0	1
Online Transaction History	0	5	0	1
Regular Premiums	5	5	5	5
Additional Permitted				
Subscriptions	5	0	0	0
APS Transfers In Allowed	5	0	0	0
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child	0	5	5	5
Trust Funds	U	5	5	5
In-Specie Transfers	0	1	1	1
Number of Funds	0	3	1	2
External Funds	5	0	1	1
Life Funds	1	0	1	1
Passive/Index Funds	0	0	1	1
Ethical Funds	0	0	5	5
ESG Funds	0	0	5	5
Unit Trusts/OEICs	5	0	1	5
Funds Non-UK	1	0	1	1
ETFs Available	4	0	1	1
Investment Trusts	1	0	1	1
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	1	5	0	1
Total	47	47	47	47
	Vanguard Managed ISA	Scottish Friendly My	FP WHEB Asset	OneFamily Stocks &
	Vanguard Asset	Sovereign Investment ISA		Shares ISA
lunios ICA	Management	Forces Mutual	FundRock Partners Limited	
Junior ISA	1	1	1	1

Platform/Self Select ISA	1	1	l <sub>1</sub>	1
Flexible ISA	5	1	1	1
Online Applications	5	5	1	5
Online Valuations	5	5	1	5
Online Contribution	l	l	<u> </u>	
History	5	5	1	5
Online Transaction History	5	5	1	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	5	5	1
APS Transfers In Allowed	1	0	1	1
Phased Investment Option	1	1	1	0
Bed and ISA	1	1	1	0
Transfers In From Child Trust Funds	0	0	0	0
In-Specie Transfers	1	1	1	1
Number of Funds	1	1	1	1
External Funds	0	1	1	1
Life Funds	0	1	1	1
Passive/Index Funds	0	1	1	1
Ethical Funds	0	1	5	1
ESG Funds	0	1	5	1
Unit Trusts/OEICs	0	1	5	5
Funds Non-UK	0	1	1	1
ETFs Available	0	1	1	1
Investment Trusts	0	1	1	1
	0	0	3	0
Auto Portfolio Rebalancing		0	0	1
Total	47	46	46	46
			First Sentier Investors	
	<b>Orbis Stocks &amp; Shares ISA</b> Orbis	WAY Stocks and Shares ISA WAY Fund Managers Ltd	First Sentier Investors Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd	Liontrust Junior ISA Liontrust Asset Mgmt
Junior ISA		ISA	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd	
Junior ISA Platform/Self Select ISA	Orbis	ISA WAY Fund Managers Ltd	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd	Liontrust Asset Mgmt
	Orbis 1	ISA WAY Fund Managers Ltd 1	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd 1	Liontrust Asset Mgmt 5
Platform/Self Select ISA	Orbis  1 1	ISA WAY Fund Managers Ltd 1	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd 1	Liontrust Asset Mgmt 5
Platform/Self Select ISA Flexible ISA	Orbis  1 1 1	ISA WAY Fund Managers Ltd  1 1	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1 1 1	Liontrust Asset Mgmt  5  1
Platform/Self Select ISA Flexible ISA Online Applications	Orbis  1 1 1 5	ISA WAY Fund Managers Ltd  1 1 1	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1 1 1	Liontrust Asset Mgmt  5 1 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History	Orbis  1 1 1 5 5 0	ISA WAY Fund Managers Ltd  1 1 1 1 1	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1  1  1  1	Liontrust Asset Mgmt  5 1 0 1 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	Orbis  1 1 1 5 5 0	ISA WAY Fund Managers Ltd  1 1 1 1 1	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1  1  1  1	Liontrust Asset Mgmt  5 1 0 1 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History	Orbis  1  1  1  5  0  0	ISA WAY Fund Managers Ltd  1 1 1 1 1 1 1 5	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1  1  1  1  1	Liontrust Asset Mgmt  5 1 0 1 0 0 0 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums	Orbis  1  1  1  5  0  0	ISA WAY Fund Managers Ltd  1 1 1 1 1 1 1	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1  1  1  1  1	Liontrust Asset Mgmt  5 1 0 1 0 0 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted	Orbis  1  1  1  5  0  0	ISA WAY Fund Managers Ltd  1 1 1 1 1 1 1 5	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1  1  1  1  1	Liontrust Asset Mgmt  5 1 0 1 0 0 0 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions	Orbis  1 1 1 5 5 5 0 0 5 5 5	ISA WAY Fund Managers Ltd  1 1 1 1 1 1 5 5	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1 1 1 1 1 5 5	Liontrust Asset Mgmt  5 1 0 1 0 0 0 5 0 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed	Orbis  1 1 1 5 5 5 0 0 5 5 5	ISA WAY Fund Managers Ltd  1 1 1 1 1 1 5 5 1	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1  1  1  1  1  1  1  1  1  1  1  1  1	Liontrust Asset Mgmt  5 1 0 1 0 0 0 5 0 0 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option	Orbis  1 1 1 5 5 5 0 0 5 5 1	ISA WAY Fund Managers Ltd  1 1 1 1 1 5 5 1	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1  1  1  1  5  1  1  1  1  1  1  1  1	Liontrust Asset Mgmt  5 1 0 1 0 0 5 0 0 0 1 1 1 1 1 1 1 1 1
Platform/Self Select ISA Flexible ISA Online Applications Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child	Orbis  1 1 1 1 5 5 5 0 0 5 1 1 1 1 1	ISA WAY Fund Managers Ltd  1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1  1  1  1  5  1  1  1  1  1  1  1  1	Liontrust Asset Mgmt  5 1 0 1 0 0 5 0 0 1 1 1 1 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds	Orbis  1 1 1 1 5 5 5 0 0 5 5 1 1 1 0	ISA WAY Fund Managers Ltd  1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1  1  1  1  1  1  1  1  1  1  1  1  1	Liontrust Asset Mgmt  5 1 0 1 0 0 0 0 5 0 1 1 1 1 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions	Orbis  1 1 1 5 5 5 0 0 5 5	ISA WAY Fund Managers Ltd  1 1 1 1 1 1 5 5	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1 1 1 1 1 5 5	Liontrust Asset Mgmt  5 1 0 1 0 0 0 5 0 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers	Orbis  1 1 1 1 5 5 5 0 0 5 5 1 1 1 1 0 1	ISA WAY Fund Managers Ltd  1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1  1  1  1  1  1  1  1  1  1  1  1  1	Liontrust Asset Mgmt  5 1 0 1 0 0 5 0 0 1 1 1 1 1 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers	Orbis  1 1 1 1 5 5 5 0 0 5 5 1 1 1 1 0 1	ISA WAY Fund Managers Ltd  1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Stocks and Shares ISA First Sentier Investors (UK) Funds Ltd  1  1  1  1  1  1  1  1  1  1  1  1  1	Liontrust Asset Mgmt  5 1 0 1 0 0 5 0 0 1 1 1 1 1 1

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Life Funds	1	1	1	1
Passive/Index Funds	1	1	1	5
Ethical Funds	1	5	5	5
ESG Funds	1	5	5	5
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	1	1	1	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	1	1
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	1	1	1	1
Total	46	46	45	45
	St James Place Junior ISA St. James's Place UT Group Ltd	<b>Unity Mutual Flexible ISA</b> Unity Mutual	<b>Wealthify Junior ISA</b> Wealthify Limited	FP Octopus Investment Funds ISA FundRock Partners Limited
Junior ISA	5	1	5	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	5	0	1
Online Applications	1	5	5	1
Online Valuations	0	5	5	1
Online Contribution History	0	1	5	1
Online Transaction History	0	1	5	1
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	0	5	0	5
APS Transfers In Allowed	0	0	0	1
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	5	0	5	0
In-Specie Transfers	1	0	0	1
Number of Funds	3	1	2	1
External Funds	1	1	0	1
Life Funds	1	5	0	1
Passive/Index Funds	1	1	0	1
Ethical Funds	5	1	0	5
ESG Funds	5	1	0	5
Unit Trusts/OEICs	5	1	0	5
Funds Non-UK	1	1	0	1
ETFs Available	1	1	0	1
Investment Trusts	1	1	0	1
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	1	0	5	1
Total	45	45	45	44
	Healthy Investment Ethical ISA Healthy Investment	Healthy Investment Ethical ISA -Adviser charging Healthy Investment	Orbis Junior Stocks &	Unity Mutual Junior ISA Unity Mutual
Junior ISA	1	1	5	5
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	0	0
Online Applications	5	5	5	5
		i e e e e e e e e e e e e e e e e e e e	I .	i e

Online Valuations	0	0	5	5
Online Contribution		0		
History	0	0	0	1
Online Transaction History	0	0	0	1
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	5	0	0
APS Transfers In Allowed	5	5	0	0
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	0	0	5	5
In-Specie Transfers	1	1	1	0
Number of Funds	1	1	1	1
External Funds	1	1	1	1
Life Funds	1	1	1	5
Passive/Index Funds	1	1	1	1
Ethical Funds	5	5	1	1
ESG Funds	5	5	1	1
Unit Trusts/OEICs	1	1	5	1
Funds Non-UK	1	1	1	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	1	1
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	0	0	1	0
Total	44	44	44	44
	FP Foresight ISA FundRock Partners Limited	Sustainable ISA Sheffield Mutual Friendly	Junior ISA Waystone Management (UK) Limited	<b>Netwealth Junior ISA</b> Netwealth
	FP Foresight ISA FundRock Partners Limited	Sustainable ISA Sheffield Mutual Friendly	Waystone Management	
Junior ISA	FP Foresight ISA FundRock Partners Limited	Sustainable ISA Sheffield Mutual Friendly Society	Waystone Management	Netwealth
Junior ISA Platform/Self Select ISA	FP Foresight ISA FundRock Partners Limited 1	Sustainable ISA Sheffield Mutual Friendly Society 1	Waystone Management	Netwealth
Junior ISA Platform/Self Select ISA	FP Foresight ISA FundRock Partners Limited  1	Sustainable ISA Sheffield Mutual Friendly Society 1	Waystone Management (UK) Limited 5	Netwealth 5
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications	FP Foresight ISA FundRock Partners Limited  1 1	Sustainable ISA Sheffield Mutual Friendly Society 1	Waystone Management (UK) Limited 5	Netwealth 5
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications	FP Foresight ISA FundRock Partners Limited  1 1 1	Sustainable ISA Sheffield Mutual Friendly Society 1 1 5	Waystone Management (UK) Limited  5 1 0	Netwealth  5 1 0 5
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution	FP Foresight ISA FundRock Partners Limited  1 1 1 1 1	Sustainable ISA Sheffield Mutual Friendly Society 1 1 1 1	Waystone Management (UK) Limited  5 1 0 1	Netwealth  5 1 0 5 5 5
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History	FP Foresight ISA FundRock Partners Limited  1 1 1 1 1	Sustainable ISA Sheffield Mutual Friendly Society  1 1 1 1 1 1	Waystone Management (UK) Limited  5 1 0 1 0	Netwealth  5 1 0 5 5 5 5
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History	FP Foresight ISA FundRock Partners Limited  1 1 1 1 1 1 1	Sustainable ISA Sheffield Mutual Friendly Society 1 1 1 1 1 1 1 1	Waystone Management (UK) Limited  5 1 0 1 0 0 0	Netwealth  5 1 0 5 5 5 5
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions	FP Foresight ISA FundRock Partners Limited  1 1 1 1 1 1 1	Sustainable ISA Sheffield Mutual Friendly Society 1 1 1 1 5 1 1 1 5	Waystone Management (UK) Limited  5 1 0 1 0 0 0 5	Netwealth  5 1 0 5 5 5 5 5 5
Junior ISA  Platform/Self Select ISA  Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions	FP Foresight ISA FundRock Partners Limited  1 1 1 1 1 1 5 5	Sustainable ISA Sheffield Mutual Friendly Society  1 1 1 1 5 1 1 1 1	Waystone Management (UK) Limited  5 1 0 1 0 0 0 5 0	Netwealth  5 1 0 5 5 5 5 0
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option	FP Foresight ISA FundRock Partners Limited  1 1 1 1 1 1 5 5	Sustainable ISA Sheffield Mutual Friendly Society 1 1 1 1 5 1 1 1 1 1 1	Waystone Management (UK) Limited  5 1 0 1 0 0 5 0 0 0 0 0 0	Netwealth  5 1 0 5 5 5 5 0 0
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Valuations  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option  Bed and ISA  Transfers In From Child	FP Foresight ISA FundRock Partners Limited  1 1 1 1 1 1 5 5 1 1	Sustainable ISA Sheffield Mutual Friendly Society  1 1 1 1 5 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Waystone Management (UK) Limited  5 1 0 1 0 0 5 0 0 1 1 1 1 1 1 1 1 1 1	Netwealth  5 1 0 5 5 5 5 0 0 1 1
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option  Bed and ISA  Transfers In From Child  Trust Funds	FP Foresight ISA FundRock Partners Limited  1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Sustainable ISA Sheffield Mutual Friendly Society  1  1  1  1  5  1  1  1  1  1  1  1  1	Waystone Management (UK) Limited  5 1 0 1 0 0 5 0 0 1 1 1 1 1 1 1 1 1 1	Netwealth  5 1 0 5 5 5 5 0 0 1 1 1 1
Junior ISA  Platform/Self Select ISA  Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers	FP Foresight ISA FundRock Partners Limited  1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Sustainable ISA Sheffield Mutual Friendly Society  1  1  1  1  5  1  1  1  1  1  1  1  1	Waystone Management (UK) Limited  5 1 0 1 0 0 0 0 5 0 0 1 1 1 1 1	Netwealth  5 1 0 5 5 5 5 0 0 1 1 1 5
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option  Bed and ISA  Transfers In From Child  Trust Funds  In-Specie Transfers  Number of Funds	FP Foresight ISA FundRock Partners Limited  1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Sustainable ISA Sheffield Mutual Friendly Society  1 1 1 1 5 1 1 1 1 1 5 1 1 1 1 1 1 1 1	Waystone Management (UK) Limited  5 1 0 1 0 0 0 0 5 0 1 1 1 1 1	Netwealth  5 1 0 5 5 5 5 0 0 1 1 1 5 1
Junior ISA  Platform/Self Select ISA  Flexible ISA  Online Applications  Online Contribution  History  Online Transaction History  Regular Premiums  Additional Permitted  Subscriptions  APS Transfers In Allowed  Phased Investment Option  Bed and ISA  Transfers In From Child  Trust Funds  In-Specie Transfers  Number of Funds  External Funds	FP Foresight ISA FundRock Partners Limited  1 1 1 1 1 1 1 1 1 1 1 1 0 1 1 1 1 1 1	Sustainable ISA Sheffield Mutual Friendly Society  1  1  1  1  5  1  1  1  1  0  1  1  1  1  1  1  1  1	Waystone Management (UK) Limited  5 1 0 1 0 0 0 0 5 0 0 1 1 1 1 1 0 2 5	Netwealth  5 1 0 5 5 5 5 6 0 0 1 1 1 5 1 2
Junior ISA  Platform/Self Select ISA  Flexible ISA Online Applications Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds	FP Foresight ISA FundRock Partners Limited  1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Sustainable ISA Sheffield Mutual Friendly Society  1  1  1  1  5  1  1  1  1  1  1  1  1	Waystone Management (UK) Limited  5 1 0 1 0 0 0 0 5 0 0 1 1 1 1 1 0 2 5	Netwealth  5 1 0 5 5 5 5 6 0 0 1 1 1 5 1 2 0

ESG Funds	5	5	5	0
Unit Trusts/OEICs	5	] 1		0
Funds Non-UK	1	1		0
ETFs Available	1	1		0
Investment Trusts	1	<u> -</u>  1	1	0
	0	0	0	0
Auto Portfolio Rebalancing		0	1	1
Total	<b>43</b>	43		<sup>1</sup>   42
	<b>Nutmeg Junior ISA</b> Nutmeg	<b>ConBrio ISA</b> ConBrio	Fundamental AIM IHT ISA (Platform) Fundamental Asset Management	Healthy With Profits Junior ISA Healthy Investment
Junior ISA	5	1	1	5
Platform/Self Select ISA	1	1	5	1
Flexible ISA	0	1	5	0
Online Applications	5	1	1	5
Online Valuations	5	1	1	0
Online Contribution History	5	1	1	0
Online Transaction History	5	1	1	0
Regular Premiums	1	5	1	5
Additional Permitted Subscriptions	0	0	5	0
APS Transfers In Allowed	0	0	0	0
Phased Investment Option	1	0	1	1
Bed and ISA	1	0	1	1
Transfers In From Child Trust Funds	5	0	0	5
In-Specie Transfers	1	1	5	0
Number of Funds	2	2	3	1
External Funds	0	1	1	1
Life Funds	0	1	1	1
Passive/Index Funds	0	1	1	1
Ethical Funds	0	5	1	5
ESG Funds	0	5	1	5
Unit Trusts/OEICs	0	5	1	1
Funds Non-UK	0	1	1	1
ETFs Available	0	1	1	1
Investment Trusts	0	1	1	1
Income Options Available	0	5	0	0
Auto Portfolio Rebalancing		0	1	0
Total	42	41	41	41
	Healthy With Profits Junior ISA - Adviser charging Healthy Investment	Shepherds Stocks and Shares ISA Shepherds Friendly Society	<b>UBS ISA</b> UBS	IFSL ISA Investment Fund Services Ltd
Junior ISA	5	1	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	1	1	1
			1	1
Online Valuations	0		1	1
			1	
Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations	42 Healthy With Profits Junior ISA - Adviser charging Healthy Investment 5 1 0	41 Shepherds Stocks and Shares ISA Shepherds Friendly Society 1	41  UBS ISA  UBS  1  1  1  1	IFSL ISA Investment Fund Ser Ltd  1 1 1

History			<u> </u>	
Online Transaction History	0	0	<u> </u>  1	1
Regular Premiums	5	5	5	5
Additional Permitted	5	5	) 	5
Subscriptions	0	5	5	5
	0	5	5	5
Phased Investment Option		1	<u>                                     </u>	1
Bed and ISA	1	1	1	1
Transfers In From Child	<u>-</u>	<u>-</u>	-	
Trust Funds	5	0	0	0
In-Specie Transfers	0	1	1	1
Number of Funds	1	1	2	3
External Funds	1	1	1	1
Life Funds	1	1	1	1
Passive/Index Funds	1	1	1	0
Ethical Funds	5	1	1	1
ESG Funds	5	1	1	1
Unit Trusts/OEICs	1	1	5	5
Funds Non-UK	1	1	1	1
ETFs Available	1	1	<u> -</u>  1	1
Investment Trusts	1	1	1	1
	0	0	0	0
Auto Portfolio Rebalancing		0	°  1	0
Total	41	41	41	40
Total		Nutmeg Stocks & Shares	SVM ISA	
	Stocks & Shares Junior ISA	ISA	SVM Asset Management	ConBrio JISA
	McInroy & Wood	Nutmeg	Ltd	ConBrio
Junior ISA	5	Nutmeg 1		5
Junior ISA Platform/Self Select ISA				
	5	1	Ltd 1	5
Platform/Self Select ISA	5 1	1 1	Ltd 1 1	5 1
Platform/Self Select ISA Flexible ISA	5 1 0	1 1 1	1 1 1	5 1 0
Platform/Self Select ISA Flexible ISA Online Applications	5 1 0 1	1 1 1 5	1 1 1 1	5 1 0 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History	5 1 0 1 5	1 1 1 5	1 1 1 1	5 1 0 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	5 1 0 1 5	1 1 1 5	1 1 1 1	5 1 0 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums	5 1 0 1 5	1 1 1 5 5	1 1 1 1 1 1 1 1 1	5 1 0 1 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History	5 1 0 1 5 0	1 1 1 5 5 5	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	5 1 0 1 1 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions	5 1 0 1 5 0 0	1 1 1 5 5 5 5 5	1 1 1 1 1 1 1 1 5	5 1 0 1 1 1 1 1 1 5 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions	5 1 0 1 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	1 1 1 5 5 5 5 5	1 1 1 1 1 1 1 5 1 1 1 1 1 1 1 1 1 1 1 1	5 1 0 1 1 1 1 1 5 0 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed	5 1 0 1 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	1 1 1 5 5 5 5 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	5 1 0 1 1 1 1 1 5 0 0 0 0 0 0 0 0 0 0 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option	5 1 0 1 5 0 0 0 5 0 0 0 1	1 1 1 5 5 5 5 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	5 1 0 1 1 1 1 1 1 5 0 0 0 0 0 0 0 0 0 0
Platform/Self Select ISA Flexible ISA Online Applications Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA	5 1 0 1 5 0 0 0 5 0	1 1 1 5 5 5 5 1 1 1 1	Ltd  1  1  1  1  1  1  1  1  1  1  1  1  1	5 1 0 1 1 1 1 1 5 5 0 0 0 0 0 0 0 0 0 0
Platform/Self Select ISA Flexible ISA Online Applications Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child	5 1 0 1 5 0 0 0 5 0 0 0 1	1 1 1 5 5 5 5 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	5 1 0 1 1 1 1 1 1 5 0 0 0 0 0 0 0 0 0 0
Platform/Self Select ISA Flexible ISA Online Applications Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds	5 1 0 0 1 5 0 0 0 1 1 1 5 5 0 0 0 0 1 1 1 5 5 0 0 0 0	1 1 1 5 5 5 5 1 1 1 1 0	Ltd  1  1  1  1  1  1  1  1  1  1  1  1  1	5 1 0 1 1 1 1 1 1 1 1 1 5 0 0 0 0 0 0 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers	5 1 0 1 5 0 0 5 0 0 1 1 1 1 5 1 1	1 1 1 5 5 5 5 1 1 1 1 0 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	5 1 0 1 1 1 1 1 1 1 5 5 0 0 0 0 0 0 0 0
Platform/Self Select ISA Flexible ISA Online Applications Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds	5 1 0 1 5 0 0 1 5 0 0 0 5 0 0 1 1 1 5 1 1	1 1 1 1 5 5 5 5 1 1 1 1 1 2	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	5 1 0 1 1 1 1 1 5 5 0 0 0 0 0 0 0 1 1 2 2
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds	5 1 0 0 1 5 0 0 0 1 1 1 5 1 1 1 1 1 1 1	1 1 1 5 5 5 5 1 1 1 1 1 2 0	Ltd  1  1  1  1  1  1  1  1  1  1  1  1  1	5 1 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds	5 1 0 1 5 0 0 0 5 0 0 1 1 1 5 1 1 1 1 1	1 1 1 5 5 5 5 1 1 1 1 1 2 0 0	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	5 1 0 0 1 1 1 5 0 0 0 0 0 0 0 0 1 1 2 2 1 1 1 1
Platform/Self Select ISA Flexible ISA Online Applications Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds	5 1 0 1 5 0 0 1 5 0 0 0 5 0 1 1 1 1 1 1	1 1 1 1 5 5 5 5 1 1 1 1 1 2 0 0 0 0	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	5 1 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds Ethical Funds	5 1 0 0 1 5 0 0 0 0 1 1 1 5 1 1 1 1 1 1	1 1 1 1 5 5 5 5 1 1 1 1 1 2 0 0 0 0 0	Ltd  1  1  1  1  1  1  1  1  1  1  1  1  1	5 1 0 0 1 1 1 5 0 0 0 0 0 0 0 0 1 1 2 2 1 1 1 1 5 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds Ethical Funds Ethical Funds Ethical Funds	5 1 0 0 1 5 0 0 0 5 0 0 1 1 1 1 1 1 1 1	1 1 1 5 5 5 5 5 1 1 1 1 2 0 0 0 0 0 0	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	5 1 0 0 1 1 1 5 5 5 5 5 5 5 5 5 5 5 5 5

ETFs Available	1	0	1	1
Investment Trusts	1	0	1	1
	0	0	0	0
Auto Portfolio Rebalancing	1	5	1	0
Total	40	40		39
Total		FP Volare ISA	IFSL Junior ISA Investment Fund Services Ltd	Netwealth ISA Netwealth
Junior ISA	1	1	5	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	1	1
Online Applications	1	1	1	5
Online Valuations	1	1	1	5
Online Contribution History	1	1	1	5
Online Transaction History	1	1	1	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	5	0	5
APS Transfers In Allowed	1	1	0	0
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	0	0	5	0
In-Specie Transfers	1	0	1	1
Number of Funds	1	2	3	2
External Funds	1	1	1	0
Life Funds	1	1	1	0
Passive/Index Funds	1	1	0	0
Ethical Funds	1	1	1	0
ESG Funds	1	1	1	0
Unit Trusts/OEICs	5	5	5	0
Funds Non-UK	1	1	1	0
ETFs Available	1	1	1	0
Investment Trusts	1	1	1	0
Income Options Available	3	3	0	0
Auto Portfolio Rebalancing	1	1	0	1
Total	39	39	39	39
	Stocks and Shares ISA	Sheffield Mutual Investment ISA Sheffield Mutual Friendly Society	Stocks & Shares ISA Allianz Global Investors	NatWest Invest ISA NatWest
Junior ISA	1	1	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	1	0
Online Applications	5	5	1	5
Online Valuations	5	1	1	5
Online Contribution History	5	1	1	5
Online Transaction History	5	1	1	5
Regular Premiums	5	5	5	0
Additional Permitted	0	5	5	0

Subscriptions				
APS Transfers In Allowed	0	5	1	0
Phased Investment Option	1	1	1	0
Bed and ISA	1	1	1	1
Transfers In From Child	0			0
Trust Funds	0	0	U	0
In-Specie Transfers	1	1	1	1
Number of Funds	3	1	2	1
External Funds	0	1	1	1
Life Funds	0	1	1	1
Passive/Index Funds	0	1	1	1
Ethical Funds	0	1	1	1
ESG Funds	0	1	1	1
Unit Trusts/OEICs	0	1	5	1
Funds Non-UK	0	1	1	5
ETFs Available	0	1	1	1
Investment Trusts	0	1	1	1
	0	0		0
Auto Portfolio Rebalancing		0		0
Total	39	39		38
Total		33	Saxo ISA	38
	Puma AIM IHT ISA	RBS Invest ISA	Saxo Capital Markets UK	Wahed Invest ISA
	Puma Investments	Royal Bank of Scotland	Limited	Wahed Invest
Junior ISA	1	1	1	1
Platform/Self Select ISA	1	1	5	1
Flexible ISA	1	0	1	1
Online Applications	1	5	5	5
Online Valuations	5	5		5
Online Contribution				
History	0	5	0	5
Online Transaction History	0	5	0	5
Regular Premiums	1	0	0	5
Additional Permitted Subscriptions	5	0	0	0
APS Transfers In Allowed	5	0	0	1
Phased Investment Option	1	0	0	1
Bed and ISA	1	1	0	0
Transfers In From Child	0	0	0	0
Trust Funds		la		4
In-Specie Transfers	1	1	0	1
Number of Funds	5	1		2
External Funds	1	1		0
Life Funds	1	1		0
Passive/Index Funds	1	1	ļ -	0
Ethical Funds	1	1		0
ESG Funds	1	1		0
Unit Trusts/OEICs	1	1	1	0
Funds Non-UK	1	5	1	0
ETFs Available	1	1	5	0
Investment Trusts	1	1	5	0
Income Options Available	0	0	0	0

Auto Portfolio Rebalancing	1	0	0	5
Total	38	38	38	38
	<b>Metfriendly Junior ISA</b> Metfriendly	<b>Moneybox Junior ISA</b> Moneybox	Sheffield Mutual Investment Junior ISA Sheffield Mutual Friendly Society	Wealthify Investment ISA Wealthify Limited
Junior ISA	5	5	5	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	0	0	1
Online Applications	5	5	5	5
Online Valuations	1	5	1	5
Online Contribution History	1	5	1	5
Online Transaction History	1	5	1	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	0	0	0	0
APS Transfers In Allowed	0	0	0	0
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	5	1	5	0
In-Specie Transfers	1	1	1	0
Number of Funds	1	1	1	2
External Funds	1	0	1	0
Life Funds	1	0	1	0
Passive/Index Funds	1	0	1	0
Ethical Funds	1	0	1	0
ESG Funds	1	0	1	0
Unit Trusts/OEICs	1	0	1	0
Funds Non-UK	1	0	1	0
ETFs Available	1	0	1	0
Investment Trusts	1	0	1	0
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	0	1	0	5
Total	37	37	37	37
	FP Russell ISA FundRock Partners Limited	Sarasin ISA Sarasin Investment Funds Ltd	Managed ISA Moneyfarm	Shrewd Savings Plan ISA NFU Mutual
Junior ISA	1	1	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	5	1
Online Applications	1	1	5	1
Online Valuations	1	0	0	1
Online Contribution History	1	0	0	1
Online Transaction History	1	0	0	1
Regular Premiums	5	1	5	5
Additional Permitted Subscriptions	5	0	5	5
APS Transfers In Allowed	1	1	5	5
Phased Investment Option	1	1	1	1

Bed and ISA	1	1	1	1
Transfers In From Child	1	1	1	1
Trust Funds	0	0	0	0
In-Specie Transfers	0	0	0	1
Number of Funds	2	2	1	1
External Funds	1	1	0	1
Life Funds	1	1	0	1
Passive/Index Funds	1	1	0	1
Ethical Funds	1	5	0	1
ESG Funds	1	5	0	1
Unit Trusts/OEICs	5	5	0	1
Funds Non-UK	1	5	0	1
ETFs Available	1	1	0	1
Investment Trusts	1	1	0	1
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	1	1	5	0
Total	36	36	35	35
	FP Pictet Stocks & Shares ISA	Moneybox ISA	Rathbone Greenbank Multi-Asset Portfolios ISA	Slater Stocks & Shares Junior ISA
	FundRock Partners Limited	Moneybox	Rathbone Asset Management Limited	Slater Investments Limited
Junior ISA	1	1	1	5
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	1	0
Online Applications	1	5	1	1
Online Valuations	1	5	1	1
Online Contribution	_			_
History	1	5	1	1
Online Transaction History	1	5	1	1
Regular Premiums	5	5	1	5
Additional Permitted Subscriptions	5	0	0	0
APS Transfers In Allowed	1	1	0	0
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	0	0	0	1
In-Specie Transfers	0	1	1	1
Number of Funds	1	1	1	1
External Funds	1	0	1	1
Life Funds	1	0	1	1
Passive/Index Funds	1	0	1	1
Ethical Funds	1	0	5	1
ESG Funds	1	0	5	1
Unit Trusts/OEICs	5	0	5	5
Funds Non-UK	1	0	1	1
ETFs Available	1	0	1	1
Investment Trusts	1	0	1	1
		0	0	0
Auto Portfolio Rebalancing		1	1	1
Total		34	34	34

		Rathbone Single Strategy	
		Fund ISA	MI Funds ISA
ŭ	Octopus Investments	Rathbone Asset	Apex Fundrock Ltd
		-	
		1	1
			1
	1	1	1
	1	1	1
1	5	0	1
0	0	0	1
0	0	0	1
5	1	1	0
0	1	0	5
0	1	1	0
1	1	1	1
1	1	1	1
1	0	0	0
1	1	1	1
2	3	2	3
		1	1
		1	1
1	1	1	1
1	1	5	1
		I	1
			5
		1	1
			1
		1	1
			0
		- I	1
			32 Metfriendly Monthly
Slater Stocks & Shares ISA Slater Investments Limited	IG Trading and Investments Ltd		Savings ISA Metfriendly
1	1	1	1
1	5	1	1
1	5	1	1
1	5	5	5
1	5	1	1
		1	4
1	U	1	1
1	0	1	1
5	1	1	1
1	0	5	5
1	1	0	0
1	1	1	1
	1	1	1
0	0	0	0
	55 1 1 0 1 1 1 1 0 0 0 5 0 0 1 1 1 1 1 1	Artemis Fund Managers Ltd  Cotopus Investments  Ltd  Cotopus Investments  Ltd  Cotopus Investments  Ltd  Ltd  Ltd  Ltd  Ltd  Ltd  Ltd  L	Artemis Fund Managers Ltd  Artemis Fund Managers Ltd  Cotopus Investments  Artemis Fund Managers  1

In-Specie Transfers  Number of Funds	1	0	1	1
External Funds	1	0	1	1
Life Funds	1	0	1	1
Passive/Index Funds	1	0	1	1
Ethical Funds	1	0	1	1
ESG Funds	1	0	1	1
Unit Trusts/OEICs	5	0	1	1
Funds Non-UK	1	0	1	1
ETFs Available	1	0	1	1
Investment Trusts	1	0	1	1
	0	0	0	0
Auto Portfolio Rebalancing		5	0	0
Total	32	31	30	30
		VT Sinfonia OFIC ISA		VT Sinfonia OEIC JISA
	Stocks & Shares Junior ISA Moneyfarm	Valu-Trac Investment Management Ltd	<b>Downing AIM ISA</b> Downing	Valu-Trac Investment
Junior ISA	5	1	1	Management Ltd 5
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	0	5	0
Online Applications	5	1	1	1
Online Valuations	0	1	1	1
Online Contribution		1	1	1
History	0	1	1	1
Online Transaction History	0	1	1	1
Regular Premiums	5	1	1	1
Additional Permitted Subscriptions	0	5	1	0
APS Transfers In Allowed	0	0	1	0
Phased Investment Option		1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child				
Trust Funds	5	0	0	0
In-Specie Transfers	0	1	1	1
Number of Funds	2	1	3	1
External Funds	0	1	1	1
Life Funds	0	1	1	1
Passive/Index Funds	0	1	1	1
Ethical Funds	0	1	1	1
ESG Funds	0	1	1	1
Unit Trusts/OEICs	0	5	1	5
Funds Non-UK	0	1	1	1
ETFs Available	0	1	1	1
Investment Trusts	0	1	1	1
	0	0	0	0
Auto Portfolio Rebalancing		1	0	1
Total	30	30	29	29
	Rathbone Multi Asset Portfolio ISA Rathbone Asset	TIME Investments AIM IHT ISA	Adapt AIM ISA Portfolios Blackfinch Investments	Unicorn AIM IHT ISA Portfolio Service Unicorn Asset
	Management Limited	TIME Investments		Management

	I	ı	I	
Junior ISA	1	1	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	1	1
Online Applications	1	1	1	1
Online Valuations	0	1	1	1
Online Contribution History	0	1	1	1
Online Transaction History	0	1	1	1
Regular Premiums	1	1	1	1
Additional Permitted	0	-		0
Subscriptions	0	5	U	0
APS Transfers In Allowed	1	5	0	0
Phased Investment Option	1	0	0	1
Bed and ISA	1	0	0	1
Transfers In From Child Trust Funds	0	0	0	0
In-Specie Transfers	1	1	5	1
Number of Funds	2	0	1	1
External Funds	1	0	0	0
Life Funds	1	0	0	0
Passive/Index Funds	1	0	0	0
Ethical Funds	1	0	0	0
ESG Funds	1	0	-	0
Unit Trusts/OEICs	5	0	0	0
Funds Non-UK	1	0	0	0
	1		-	
IF LES Available	l1	In .	ln .	lo l
ETFs Available	1	0		0
Investment Trusts	1	0	0	0
Investment Trusts Income Options Available	0	0	0	0
Investment Trusts Income Options Available Auto Portfolio Rebalancing	1 0 1	0 0 5	0 0 0	0 1 1
Investment Trusts Income Options Available	0	0 0 5 <b>24</b>	0	0 1 1 14
Investment Trusts Income Options Available Auto Portfolio Rebalancing	1 0 1	0 0 5	0 0 0	0 1 1
Investment Trusts Income Options Available Auto Portfolio Rebalancing	1 0 1 25 Credo ISA	0 5 24 Platform One Stocks & Shares Junior ISA	0 0 0 14 BlackRock NISA	0 1 1 1 14 Platform One Stocks & Shares ISA
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total	1 0 1 25 Credo ISA Credo	0 5 24 Platform One Stocks & Shares Junior ISA Platform One	0 0 14 BlackRock NISA BlackRock	0 1 1 14 Platform One Stocks & Shares ISA Platform One
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total Junior ISA	1 0 1 25 Credo ISA Credo 1	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One	0 0 14 BlackRock NISA BlackRock	0 1 1 14 Platform One Stocks & Shares ISA Platform One
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA Flexible ISA	1 0 1 25 Credo ISA Credo 1 5 5	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5	0 0 14 BlackRock NISA BlackRock	0 1 1 14 Platform One Stocks & Shares ISA Platform One 1
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA	1 0 1 25 Credo ISA Credo 5 1 5 5	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5 5	0 0 14 BlackRock NISA BlackRock 1 1 0	0 1 1 14 Platform One Stocks & Shares ISA Platform One 1 5
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations	1 0 1 25 Credo ISA Credo 1 5 5 0 0	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5 0 0	0 0 14 BlackRock NISA BlackRock 1 1 0	0 1 1 1 14 Platform One Stocks & Shares ISA Platform One 1 5 0 0
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA Flexible ISA Online Applications	1 0 1 25 Credo ISA Credo 1 5 5 0 0	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5 5 0	0 0 14 BlackRock NISA BlackRock 1 1 0	0 1 1 14 Platform One Stocks & Shares ISA Platform One 1 5 0
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	1 0 1 1 25 Credo ISA Credo 1 1 5 5 0 0 0 0 0	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5 0 0	0 0 14 BlackRock NISA BlackRock 1 1 0 0 0	0 1 1 1 14 Platform One Stocks & Shares ISA Platform One 1 5 0 0
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History	1 0 1 1 25 Credo ISA Credo 1 1 5 5 0 0 0 0 0	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5 5 0 0 0 0	0 0 14 BlackRock NISA BlackRock 1 1 0 0 0	0 1 1 1 14 Platform One Stocks & Shares ISA Platform One 1 5 0 0 0 0
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History	1 0 1 25 Credo ISA Credo 1 5 5 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5 5 0 0 0 0 0 0	0	0 1 1 1 14 Platform One Stocks & Shares ISA Platform One 1 5 0 0 0 0 0 0 0
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums	1 0 1 25 Credo ISA Credo 1 5 5 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5 5 0 0 0 0	0	0 1 1 1 14 Platform One Stocks & Shares ISA Platform One 1 5 0 0 0 0 0
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted	1 0 1 25 Credo ISA Credo 1 5 5 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5 5 0 0 0 0 0 0	0	0 1 1 1 14 Platform One Stocks & Shares ISA Platform One 1 5 0 0 0 0 0 0 0
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions	1 0 1 25 Credo ISA Credo O 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5 5 0 0 0 0 0 0 0	0	0 1 1 1 14 Platform One Stocks & Shares ISA Platform One 1 5 0 0 0 0 0 0 0 0
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed	1 0 1 25 Credo ISA Credo O 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5 5 0 0 0 0 0 0 0 0 0	0	0 1 1 1 14 Platform One Stocks & Shares ISA Platform One 1 5 0 0 0 0 0 0 0 0 0 0
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child	1 0 0 1 25 Credo ISA Credo O 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5 5 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 14 BlackRock NISA BlackRock 1 1 1 0 0 0 0 0 0 5 0 0 0 0 0 0 0 0 0 0	0 1 1 1 14 Platform One Stocks & Shares ISA Platform One 1 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds	1 0 0 1 25 Credo ISA Credo O 1 5 5 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0	0 1 1 1 14 Platform One Stocks & Shares ISA Platform One 1 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers	1 0 0 1 1 25 Credo ISA Credo O 1 1 5 5 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0	0 1 1 1 14 Platform One Stocks & Shares ISA Platform One 1 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
Investment Trusts Income Options Available Auto Portfolio Rebalancing Total  Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds	1 0 0 1 25 Credo ISA Credo O 1 5 5 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 5 24 Platform One Stocks & Shares Junior ISA Platform One 5 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0	0 1 1 1 14 Platform One Stocks & Shares ISA Platform One 1 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0

Life Funds	0	0	0	0
		0	0	0
		0		0
ESG Funds	0	0	0	0
Unit Trusts/OEICs	0	0	0	0
Funds Non-UK	0	0	0	0
ETFs Available	0	0	0	0
Investment Trusts	0	0	0	0
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	0	0		0
		10	7	6
	<b>ISA</b> Rathbones Investment Management			
Junior ISA	1			
Platform/Self Select ISA	1			
Flexible ISA	0			
Online Applications	0			
Online Valuations	0			
Online Contribution History	0			
Online Transaction History	0			
Regular Premiums	0			
Additional Permitted Subscriptions	0			
APS Transfers In Allowed	0			
Phased Investment Option	0			
Bed and ISA	0			
Transfers In From Child Trust Funds	0			
In-Specie Transfers	0			
Number of Funds	0			
External Funds	0			
Life Funds	0			
Passive/Index Funds	0			
Ethical Funds	0			
ESG Funds	0			
Unit Trusts/OEICs	0			
Funds Non-UK	0			
ETFs Available	0			
Investment Trusts	0			
Income Options Available	0			
Auto Portfolio Rebalancing	0			
Total	2			



DNA description for DNA Grap	h Export : 02/01/2025 08:51:56
Junior ISA  Is this a Junior ISA  1 Not a Junior ISA  5 Junior ISA	Platform/Self Select ISA  Is this a Platform/Self Select ISA.  1 Not a Platform/Self Select ISA  5 Platform/Self Select ISA
Flexible ISA ISA offers Stocks & Shares ISA flexibility - allows previously withdrawn money to be returned within the same tax year without further contributing to the investor's annual allowance 1 Is not a flexible ISA 5 Is a flexible ISA	Online Applications  Do providers accept business for this product online  1 It is not possible to write new business online for this product  5 It is possible to write new business online for this product
Online Valuations Valuations of underlying portfolio can be viewed online 1 Online valuations are not provided 5 Online valuations are provided	Online Contribution History Online contribution history available 1 Online contribution history not provided 5 Online contribution history provided
Online Transaction History  Product provides online transaction history  1 Online transaction history not provided  5 Online transaction history provided	Regular Premiums  Regular premiums accepted  1 Regular premiums are not accepted  5 Regular premiums are accepted
Additional Permitted Subscriptions  Product facilitates additional permitted subscriptions for the client upon spouse/civil partner death.  1 Additional permitted subscriptions not facilitated  5 Additional permitted subscriptions facilitated	APS Transfers In Allowed Additional Permitted Subscriptions (APS), on top of the annual subscription limit, available to the surviving spouse of a deceased ISA holder, may be transferred in from another ISA provider to this ISA  1 Transfers in of Additional Permitted Subscriptions not permitted 5 Transfers in of Additional Permitted Subscriptions permitted
Phased Investment Option Option for phased investment available. 1 Phased investment option not available 5 Phased investment option available	Bed and ISA  May Bed and ISA an investment, selling an investment held outside the ISA and then repurchase it when in the ISA  1 Bed and ISA not available  5 Bed and ISA available
Transfers In From Child Trust Funds Can funds from Child Trust Funds be transferred in? 1 Transfers in from Child Trust Fund not allowed 5 Transfers in from Child Trust Fund allowed	In-Specie Transfers In-specie transfers from another ISA manager accepted. 1 In-specie Transfers not accepted 5 In-specie Transfers accepted
Number of Funds  Number of Funds Available  1 1 - 5  2 6 - 20  3 21 - 50  4 51 - 150  5 151 and over	External Funds Choice of funds from groups other than the ISA provider 1 No external fund link choices 5 External fund link choices
Life Funds Life funds available 1 No life funds facilitated 5 Life funds facilitated	Passive/Index Funds Can funds be chosen on a tracker/passive basis? 1 Cannot choose index tracking funds 5 Can choose index tracking funds
Ethical Funds  Ethical/environmental fund links available  1 No ethical/environmental fund links available  5 Ethical/environmental fund links available	ESG Funds  Environmental, social and governance fund links available  1 No ESG fund links available  5 ESG fund links available
Unit Trusts/OEICs Unit Trusts/OEICs available within this product 1 Investment in unit trusts/OEICs is not accepted 5 Investment in unit trusts/OEICs is accepted	Funds Non-UK  Offshore Funds available within this product  1 Investment in offshore funds is not accepted  5 Investment in offshore funds is accepted
ETFs Available Exchange Traded Funds available	Investment Trusts Investment Trusts available within this product

1 ETFs not accepted 4 Either UK or non-UK ETFs accepted 5 Both UK and non-UK ETFs accepted	Investment in investment trusts is not accepted     Investment in investment trusts is accepted
Income Options Available Income payable as a % of current value, a fixed sum (or % of initial value), or as natural income 1 One income option available 3 Two income options available 5 All three income options available	Auto Portfolio Rebalancing Facility for portfolios to be automatically rebalanced  1 Automated portfolio rebalancing not available  5 Automated portfolio rebalancing available

#### **Notes**

KEY: na = not applicable, ns = not stated, nd = not disclosed

The Data Numerical Analysis (DNA) allows the analysis of data on both a quantitative and a qualitative basis, showing not only who does what, but more importantly, how well they do it. This is achieved by a system of benchmarking or ranking on a 1 to 5 basis called DNA. A score of 1 indicates a weak feature; a score of 5 indicates an excellent feature.

Source: Defaqto Matrix, data effective as of 02 January 2025 00:00

Produced on 02 January 2025

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