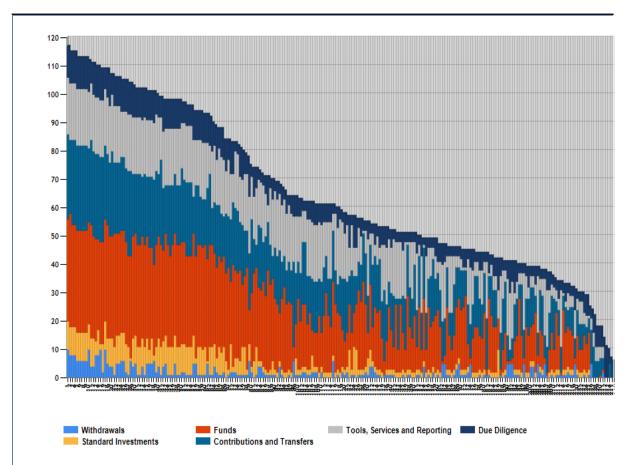
Investment ISA DNA Graph Report



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=	LV= ISA Portfolio
6	Scottish Widows	Platform Stocks & Shares ISA
7	SS&C Hubwise	Stocks & Shares ISA
8	SS&C Hubwise	Stocks & Shares ISA intelliflo wealthlink
9	Transact	Transact ISA
10	Nucleus	Nucleus Wrap ISA
11	7IM	7IM Platform Stocks & Shares ISA
12	M&G Wealth	M&G Wealth ISA
13	Parmenion Capital Partners LLP	Parmenion Stocks & Shares ISA
14	True Potential Investments	True Potential ISA
15	Aberdeen	Elevate ISA
16	Aberdeen	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	KILLIK & Co	Killik & Co Stocks & Shares ISA
27	Barclays	Smart Investor Investment 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	P1 Investment Management	P1 Junior ISA
33	Quilter	Junior ISA
34	Raymond James Investment Services	RJIS Stocks & Shares ISA
35	Aberdeen	FundZone S&S ISA
36	Nucleus	Nucleus Wrap Junior ISA
37	Parmenion Capital Partners LLP	Parmenion Stocks & Shares Junior ISA
38	True Potential Investments	True Potential Junior ISA
39	Hargreaves Lansdown	HL Stocks & Shares ISA
40	AJ Bell	AJ Bell Investment ISA
41	Interactive Investor	ISA
42	AJ Bell	AJ Bell Junior ISA
43	Aviva	Aviva Stocks & Shares ISA
44	Fidelity Adviser Solutions	Junior ISA
45	James Brearley	Junior ISA
46	Scottish Widows	Platform Stocks & Shares JISA
47	SS&C Hubwise	Stocks & Shares Junior ISA
48	SS&C Hubwise	Stocks & Shares Junior ISA intelliflo wealthlink
49	Transact	Transact Junior ISA
50	James Hay Partnership	James Hay Modular ISA
51	James Hay Partnership	James Hay Wrap ISA
52	Bank of Scotland	Self Select Stocks & Shares ISA
53	Halifax	Self Select Stocks & Shares ISA
54	Lloyds Bank	Share Dealing ISA
55	Aegon	Aegon Junior ISA
56	Aviva	Aviva Junior ISA Portfolio
57	Bestinvest	Bestinvest Stocks & Shares Junior ISA
58	KILLIK & Co	Killik & Co Junior Stocks & Shares 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	Aviva	Aviva My Money S&S ISA
69	NatWest Cushon	Cushon ISA
70	Vanguard Asset Management	Vanguard ISA
71	AJ Bell Dodl	Dodl Investment ISA
72	Chelsea Financial Services	Chelsea FundStore Build your own ISA
73	Redmayne Bentley	Redmayne-Bentley Stocks & Shares ISA
74	Wealth at Work Limited	My Wealth ISA
75	Pilling & Co Stockbrokers Ltd	Pilling Stocks & Shares Junior ISA Execution Only
76	Redmayne Bentley	Redmayne-Bentley Junior ISA
77	CMC Invest	CMC Invest Stocks & Shares ISA
		S. T. S. T. S. C. S. C. S. T. S. T. C.

78 NatWest Cushon Cushon Junior ISA	
79 InvestEngine (UK) Limited InvestEngine ISA	
80 Freetrade Investment ISA	
81 M&G Securities Ltd M&G Stocks & Shares ISA	
82 Vanguard Asset Management Vanguard Junior ISA	
83 Invesco Stocks & Shares ISA	
84 NFU Mutual Select ISA	
85 Chelsea Financial Services Chelsea FundStore Junior ISA	
86 Legal & General Stocks and Shares ISA	
87 M&G Securities Ltd M&G Stocks and Shares Junior ISA	
88 Chip Stocks & Shares ISA	
89 Legal & General (Portfolio Mgt Services) Workplace ISA	
90 Scottish Friendly My Choice (ISA)	
91 The Children's ISA Limited Children's ISA Ethical Option	
92 Prudential Prudential ISA	
93 Scottish Friendly My Select Junior ISA	
94 Plum Plum ISA	
95 NatWest Invest Junior ISA	
96 Quilter Cheviot Quilter Cheviot Ltd ISA	
97 Royal Bank of Scotland RBS Invest Junior ISA	
98 Scottish Friendly My Climate Leader Choice ISA	
99 Trading 212 Trading 212 Stocks ISA	
100 NFU Mutual Select Junior ISA	
101 The Children's ISA Limited Children's ISA Actively Managed Opt	ion
102 Beanstalk Beanstalk Junior ISA	
103 Columbia Threadneedle Investments CT ISA (Investment Trust)	
104 Jupiter Asset Management Jupiter ISA	
105 Ninety One Ninety One ISA	
106 The Children's ISA Limited Children's ISA Low Cost Option	
107 Bank of Scotland Bank of Scotland Ready Made Invest	ments ISA
108 Columbia Threadneedle Investments CT ISA (Unit Trust/OEIC)	
109 Forester Life Ltd Stakeholder Junior ISA	
110 Halifax Halifax Ready Made Investments ISA	
111 Lloyds Bank Ready Made Investment	: ISA
112 Pilling & Co Stockbrokers Ltd Pilling Stocks & Shares Junior ISA Ma	naged
113 Red Rose Assurance Junior Shariah ISA	
114 Scottish Friendly My Climate Leader Select Junior ISA	
115 The Children's ISA Limited Children's ISA Shariah Option	
116 Beanstalk Beanstalk ISA	
117 Monzo Investments ISA	
118 Forester Life Ltd Stakeholder ISA	
119 Stellar Asset Management Ltd Stellar AIM IHT Service	
120 Wesleyan Unit Trust Mgrs Ltd Wesleyan Unit Trust ISA	
121 Artemis Fund Managers Ltd Artemis ISA	
122 Charles Stanley & Co Ltd Charles Stanley Direct ISA	
123 IG Trading and Investments Ltd Stocks & Shares ISA	
15 Hading and investments Eta Stocks & Shales 15A	
124 Virgin Money Virgin Money Virgin Money Stocks and Shares ISA	
9	
124 Virgin Money Stocks and Shares ISA	
124 Virgin Money Stocks and Shares ISA 125 Charles Stanley & Co Ltd Charles Stanley Direct Junior ISA	
124 Virgin Money Virgin Money Stocks and Shares ISA 125 Charles Stanley & Co Ltd Charles Stanley Direct Junior ISA 126 OneFamily OneFamily Junior ISA	
124 Virgin Money Virgin Money Stocks and Shares ISA 125 Charles Stanley & Co Ltd Charles Stanley Direct Junior ISA 126 OneFamily OneFamily Junior ISA 127 Red Rose Assurance Shariah ISA	

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

184	Healthy Investment	Healthy With Profits Junior ISA
185	Healthy Investment	Healthy With Profits Junior ISA - Adviser charging
186	Netwealth	Netwealth Junior ISA
187	Saxo Capital Markets UK Limited	Saxo ISA
188	Fundamental Asset Management	Fundamental AIM IHT ISA (Platform)
189	IG Trading and Investments Ltd	Smart Portfolio ISA
190	Nutmeg	Nutmeg Junior ISA
191	Shepherds Friendly Society	Shepherds Stocks and Shares ISA
192	UBS	UBS ISA
193	Wealthify Limited	Wealthify Investment ISA
194	Investment Fund Services Ltd	IFSL ISA
195	McInroy & Wood	Stocks & Shares Junior ISA
196	Nutmeg	Nutmeg Stocks & Shares ISA
197	Sarasin Investment Funds Ltd	Sarasin ISA
198	ConBrio	ConBrio JISA
199	FundRock Partners Limited	FP Apollo ISA
200	FundRock Partners Limited	FP Volare ISA
201	Investment Fund Services Ltd	IFSL Junior ISA
202	NuWealth	Stocks and Shares ISA
203	Sheffield Mutual Friendly Society	Sheffield Mutual Sustainable ISA
204	Allianz Global Investors	Stocks & Shares ISA
205	Puma Investments	Puma AIM IHT ISA
206	Wahed Invest	Wahed Invest ISA
207	Metfriendly	Metfriendly Junior ISA
208	Moneybox	Moneybox Junior ISA
209	FundRock Partners Limited	FP Russell ISA
210	NFU Mutual	Shrewd Savings Plan ISA
211	Moneybox	Moneybox ISA
212	Rathbones Asset Management Limited	Rathbone Greenbank Multi-Asset Portfolios ISA
213	Slater Investments Limited	Slater Stocks & Shares Junior ISA
214	Artemis Fund Managers Ltd	Artemis Junior ISA
215	Octopus Investments	Octopus AIM Inheritance Tax ISA
216	Rathbones Asset Management Limited	Rathbone Single Strategy Fund ISA
217	Apex Fundrock Ltd	MI Funds ISA
218	Slater Investments Limited	Slater Stocks & Shares ISA
219	Interactive Investor	Managed ISA
220	Metfriendly	Metfriendly Lump Sum ISA
221	Metfriendly	Metfriendly Monthly Savings ISA
222	Valu-Trac Investment Management Ltd	VT Sinfonia OEIC ISA
223	Downing	Downing AIM ISA
224	Valu-Trac Investment Management Ltd	VT Sinfonia OEIC JISA
225	Rathbones Asset Management Limited	Rathbone Multi Asset Portfolio ISA
226	TIME Investments	TIME Investments AIM IHT ISA
227	Moneyfarm	Stocks & Shares Junior ISA
228	Blackfinch Investments	Adapt AIM ISA Portfolios
229	Moneyfarm	DIY ISA
230	Moneyfarm	Managed ISA
231	Unicorn Asset Management	Unicorn AIM IHT ISA Portfolio Service
232	Credo	Credo ISA
233	Platform One	Platform One Stocks & Shares Junior ISA
	BlackRock	BlackRock NISA
234	DIACKNOCK	Blackitock 1415/1
234 235	Platform One	Platform One Stocks & Shares ISA



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	ISA Quilter	Aviva ISA Portfolio 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
	LV= ISA Portfolio LV=	Platform Stocks & Shares ISA Scottish Widows	Stocks & Shares ISA SS&C Hubwise	Stocks & Shares ISA intelliflo wealthlink SS&C Hubwise
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	Ī _c	l _c	l _c
) 	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	5	5	5
ETFs Available	5	5	5	5
Investment Trusts	5	5	5	5
Income Options Available	1	1	5	5
Auto Portfolio Rebalancing	5	5	1	1
Total	113	113	113	113
	Transact ISA Transact	Nucleus Wrap ISA Nucleus	7IM Platform Stocks & Shares ISA 7IM	M&G Wealth ISA M&G Wealth
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	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
	5	5	5	5
In-Specie Transfers Number of Funds	5	5	5	5
External Funds	5	5	5	5
Life Funds	1	1	5 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	5	5
Funds Non-UK	5	5	5	5
ETFs Available	5	4	5	5
	5		5	5
Investment Trusts		5		
<u>'</u>	5	5	3	3
Auto Portfolio Rebalancing		5	1	1
Total	113	True Determinal ICA		111
	Parmenion Stocks & Shares ISA	True Potential ISA True Potential	Elevate ISA Aberdeen	Wrap Junior ISA Aberdeen

	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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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 &	Fusion Wealth Junior ISA	M&G Wealth Junior ISA	Bestinvest Stocks &
	Shares Junior ISA	Fusion Wealth	M&G Wealth Junior ISA M&G Wealth	Shares ISA
	Fundment			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	5	5	5	5
History			Ĭ	<u> </u>
Online Transaction History	5	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	0	0	0	5
APS Transfers In Allowed	0	0	0	5
Phased Investment Option	5	5	5	1
Bed and ISA	5	5	5	5
Transfers In From Child 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	1
Auto Portfolio Rebalancing		5	1	1
Total	106	106	106	105
. otui		Killik & Co Stocks &	Smart Investor	
	ISA James Brearley	Shares ISA KILLIK & Co	Investment ISA Barclays	Wealthtime Classic ISA Wealthtime Classic
Junior ISA	1	1	1	1
Platform/Self Select ISA	5	5	5	5
Flexible ISA	5	5	5	5

14
14 L Junior ISA
J unior ISA Investment
Junior ISA
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Junior ISA Investment
J unior ISA Investment
Junior ISA Investment
J unior ISA Investment
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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
	3	0	0	0
Auto Portfolio Rebalancing		1	1	1
Total	103	102	102	102
	Junior ISA Quilter	RJIS Stocks & Shares ISA Raymond James Investment Services	FundZone S&S ISA Aberdeen	Nucleus Wrap Junior ISA Nucleus
Junior ISA	5	1	1	5
Platform/Self Select ISA	5	5	5	5
Flexible ISA	0	5	5	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	0	5	5
Additional Permitted Subscriptions	0	5	5	0
	0	5	5	0
Phased Investment Option		1	5	1
Bed and ISA	1	5	5	5
Transfers In From Child Trust Funds	5	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	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	1	5
ETFs Available	5	5	1	4
Investment Trusts	5	5	1	5
	0	3	5	0
Auto Portfolio Rebalancing		1	1	5
	102	102	101	101
	Parmenion Stocks & Shares Junior ISA Parmenion Capital Partners LLP	True Potential Junior ISA True Potential Investments	HL Stocks & Shares ISA Hargreaves Lansdown	AJ Bell Investment ISA AJ Bell
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	5

Online Transaction History	l _r	l _r	l _r	r
Online Transaction History		5	5	5
Regular Premiums	5	5	5	5
Additional Permitted	0	0	5	5
Subscriptions	-	 -	_	
APS Transfers In Allowed	0	0	5	1
Phased Investment Option	5	5	1	1
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	1	5	5	5
	0	0	1	3
Auto Portfolio Rebalancing	5	5	1	1
Total	101	101		99
	ISA	AJ Bell Junior ISA	Aviva Stocks & Shares ISA	
	Interactive Investor	AJ Bell	Aviva	Fidelity Adviser Solutions
				, , , , , , , , , , , , , , , , , , ,
Junior ISA	1	5	1	5
Junior ISA Platform/Self Select ISA				5
	1	5	1	5
Platform/Self Select ISA	5	5 5	5	5 5
Platform/Self Select ISA Flexible ISA	1 5 1	5 5 0	1 5 5	5 5 0
Platform/Self Select ISA Flexible ISA Online Applications	1 5 1 5	5 5 0 5	1 5 5 5	5 5 0 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History	1 5 1 5 5 0 0	5 0 5 5	1 5 5 5	5 5 0 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	1 5 1 5 5 0 0	5 0 5 5 5	1 5 5 5 5 5	5 5 0 5 5 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums	1 5 1 5 5 0 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 0 5 5 5 5	1 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 0 5 5 5 5 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History	1 5 1 5 5 5 0 5 5 5 5 5 6 5 6 6 6 6 6 6 6 6 6	5 5 0 5 5 5	1 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 0 5 5 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted	1 5 1 5 5 0 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 0 5 5 5 5	1 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 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	1 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 0 5 5 5 5 5 0	1 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 0 5 5 5 5 5
Platform/Self Select ISA Flexible ISA Online Applications Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions APS Transfers In Allowed	1 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 0 5 5 5 5 5 0	1 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 0 5 5 5 5 5 6 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	1 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 0 5 5 5 5 6 0 0	1 5 5 5 5 5 5 5 5 1 1	5 5 0 5 5 5 5 5 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	1 5 1 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	5 5 0 5 5 5 5 6 0 0 1	1 5 5 5 5 5 5 5 5 1 1 1 1 1 1 1 1 1 1 1	5 5 0 5 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 Bed and ISA Transfers In From Child Trust Funds	1	5 5 0 5 5 5 5 6 0 0 1 5 5	1	5 5 0 5 5 5 5 0 0 0 5 5 1 5 5 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 APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers	1	5 5 0 5 5 5 5 6 0 0 1 5 5 5	1	5 5 0 5 5 5 5 0 0 0 5 1 5 5 5 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 APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds External Funds	1	5 5 0 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	1	5 5 0 5 5 5 5 6 0 0 5 5 1 5 5 5 5 5 5 5 7 7 7 8 7 8 8 8 8 8 8 8 8
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	1	5 5 0 5 5 5 5 6 0 0 1 5 5 5 5 5 5 5	1	5 5 0 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5
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	1	5 5 0 5 5 5 5 6 0 0 1 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
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	1	5 5 0 0 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
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	1	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
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 ESG Funds Unit Trusts/OEICs	1	5 5 0 5 5 5 5 6 0 0 1 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
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	1	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

Investment Trusts	5	5	5	5
	0	0		0
Auto Portfolio Rebalancing		1	1	1
Total	99	98		98
	Junior ISA James Brearley	Platform Stocks & Shares JISA Scottish Widows	Stocks & Shares Junior ISA SS&C Hubwise	Stocks & Shares Junior ISA intelliflo wealthlink SS&C Hubwise
Junior ISA	5	5	5	5
Platform/Self Select ISA	5	5	5	5
Flexible ISA	0	0	0	0
Online Applications	1	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	0
APS Transfers In Allowed	0	0	0	0
Phased Investment Option	1	5	5	5
Bed and ISA	5	1	1	1
Transfers In From Child Trust Funds	5	1	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	5	5	5
ETFs Available	5	5	5	5
Investment Trusts	5	5	5	5
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	5	5	1	1
Total	98	98		98
	Transact Junior ISA Transact	James Hay Modular ISA James Hay Partnership	James Hay Wrap ISA James Hay Partnership	Self Select Stocks & Shares ISA Bank of Scotland
Junior ISA	5	1	1	1
Platform/Self Select ISA	5	5	5	5
Flexible ISA	0	1	1	1
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	5	5
Additional Permitted Subscriptions	0	5	5	5
APS Transfers In Allowed	0	5	5	5

Phased Investment Option	ς	1	1	1
Bed and ISA	5	<u> -</u> 1	5	5
Transfers In From Child	5	1	5	5
Trust Funds	5	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	1	5	5	1
ETFs Available	5	5	5	5
Investment Trusts	5	5	5	5
Income Options Available	0	1	1	0
Auto Portfolio Rebalancing	1	1	1	1
Total	98	97	97	96
	Self Select Stocks & Shares ISA Halifax	Share Dealing ISA Lloyds Bank	Aegon Junior ISA Aegon	Aviva Junior ISA Portfolio Aviva
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 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	5	0	0
Phased Investment Option	1	1	5	1
Bed and ISA	5	5	5	1
Transfers In From Child Trust Funds	0	0	5	1
In-Specie Transfers	5	5	5	5
Number of Funds	5	5	5	5
External Funds	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	1	1	5	5
ETFs Available	5	5	1	5
Investment Trusts	5	5	1	5
Income Options Available	0	0	0	0
		1.	5	5
Auto Portfolio Rebalancing	[1	1	Þ	la la

	Bestinvest Stocks &	Killik & Co Junior Stocks &		RJIS Junior ISA
	Shares Junior ISA	Shares ISA	HL Junior ISA	Raymond James
	Bestinvest	KILLIK & Co	Hargreaves Lansdown	Investment Services
Junior ISA	5	5	5	5
Platform/Self Select ISA	5	5	5	5
Flexible ISA	0	0	0	0
Online Applications	5	1	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	0
Additional Permitted	0	0	0	0
Subscriptions	0	0	U	0
APS Transfers In Allowed	0	0	0	0
Phased Investment Option	1	1	1	1
Bed and ISA	1	5	1	5
Transfers In From Child	5	5	5	5
Trust Funds	5	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	5	5	5
ETFs Available	5	5	4	5
Investment Trusts	5	5	5	5
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	1	1	1	1
Total	94	94	93	93
	Wealthtime Classic Junior			
	ISA	Junior ISA Interactive Investor	Willis Owen Junior ISA Willis Owen	Stocks & Shares ISA
	Wealthtime Classic	interactive investor	willis Owen	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	5	0	5	5
History				
Online Transaction History	5	0	5	5
Regular Premiums	5	5	5	5
Additional Permitted	0	0	0	1
Subscriptions				_
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	5	5	1	0
Trust Funds				-

	T	Г	Г	
In-Specie Transfers	5	5	5	1
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	0	5	5	3
Investment Trusts	1	5	5	5
Income Options Available	0	0	0	3
Auto Portfolio Rebalancing	5	1	1	1
Total	93	92	90	89
	Stanta O Charanta d'artico	Self Select Stocks &	Pilling Stocks & Shares ISA	A
	Stocks & Shares Junior ISA Fidelity Personal Investing	Shares ISA	Pilling & Co Stockbrokers	Aviva My Money S&S ISA Aviva
	ridenty reisonal investing	IWeb	Ltd	Aviva
Junior ISA	5	1	1	1
Platform/Self Select ISA	5	5	5	5
Flexible ISA	0	1	5	1
Online Applications	5	5	1	5
Online Valuations	5	5	5	5
Online Contribution	Г	Г	_	Г
History	5	5	5	5
Online Transaction History	5	5	5	5
Regular Premiums	5	1	1	5
Additional Permitted	0	5	5	1
Subscriptions				1
APS Transfers In Allowed	0	5	5	1
Phased Investment Option	5	1	1	1
Bed and ISA	5	1	5	1
Transfers In From Child	1	0	0	0
Trust Funds				
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	5
ESG Funds	5	5	5	5
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
Income Options Available	0	0	1	1
Auto Portfolio Rebalancing	1	1	1	1
Total	88	88	88	84
	Cushon ISA NatWest Cushon	Vanguard ISA Vanguard Asset Management	Dodl Investment ISA AJ Bell Dodl	Chelsea FundStore Build your own ISA Chelsea Financial Services
Junior ISA	1	1	1	1
Platform/Self Select ISA	1	5	1	5
L	l	<u> </u>	I	<u> </u> -

Flexible ISA	5	5	1	5
Online Applications	5	5	5	5
Online Valuations	5	5	5	5
Online Contribution	5			
History	5	0	5	0
Online Transaction History	5	5	5	0
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	1
Bed and ISA	1	0	1	1
Transfers In From Child Trust Funds	0	0	0	0
In-Specie Transfers	1	1	5	5
Number of Funds	5	4	4	5
External Funds	5	1	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	1	5
ETFs Available	1	5	4	1
Investment Trusts	1	1	1	1
	0	0	<u> </u>	1
income Options Available				
Auto Portfolio Rebalancing	1	0	1	1
		0		
Auto Portfolio Rebalancing	1 84 Redmayne-Bentley Stocks & Shares ISA	0 84 My Wealth ISA	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers	1 83 Redmayne-Bentley Junior ISA
Auto Portfolio Rebalancing Total	1 84 Redmayne-Bentley Stocks & Shares ISA	0 84 My Wealth ISA Wealth at Work Limited	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd	1 83 Redmayne-Bentley Junior ISA Redmayne Bentley
Auto Portfolio Rebalancing Total Junior ISA	1 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1	0 84 My Wealth ISA Wealth at Work Limited	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd	1 83 Redmayne-Bentley Junior ISA Redmayne Bentley
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA	1 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1	0 84 My Wealth ISA Wealth at Work Limited 1	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5	1 83 Redmayne-Bentley Junior ISA Redmayne Bentley 5
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA	1 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 5	0 84 My Wealth ISA Wealth at Work Limited 1 1	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5	1 83 Redmayne-Bentley Junior ISA Redmayne Bentley 5 5
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications	1 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 5	0 84 My Wealth ISA Wealth at Work Limited 1 1 1	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0	1 83 Redmayne-Bentley Junior ISA Redmayne Bentley 5 5 0
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	1 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 1 5 5 1	0 84 My Wealth ISA Wealth at Work Limited 1 1 5 5	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5	1 83 Redmayne-Bentley Junior ISA Redmayne Bentley 5 5 0 1
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History	1 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 1 5 5 1	0 84 My Wealth ISA Wealth at Work Limited 1 1 5 5 5	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5	1 83 Redmayne-Bentley Junior ISA Redmayne Bentley 5 5 0 1 5 5
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History	1 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 5 5 1 5 5	0 84 My Wealth ISA Wealth at Work Limited 1 1 5 5 5 5	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 5 5	1 83 Redmayne-Bentley Junior ISA Redmayne Bentley 5 5 0 1 5 5 5 5
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 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 5 1 5 1 1 1	0 84 My Wealth ISA Wealth at Work Limited 1 1 5 5 5 5 5	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 5 5	1 83 Redmayne-Bentley Junior ISA Redmayne Bentley 5 5 0 1 5 5 5 5 5 5 5 5 5 5 5 5 6 7 7 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
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 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 5 1 5 1 5 5 5 5 5 5 5 5	0 84 My Wealth ISA Wealth at Work Limited 1 1 5 5 5 5 5 5 5	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 5 0 0 1 5 0	1 83 Redmayne-Bentley Junior ISA Redmayne Bentley 5 5 0 1 5 5 5 5 0
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 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 5 1 5 1 5 5 5 5 5 5 5 5	0 84 My Wealth ISA Wealth at Work Limited 1 1 1 5 5 5 5 5 5 5 5	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 5 0 0 0 0	1 83 Redmayne-Bentley Junior ISA Redmayne Bentley 5 5 0 1 5 5 0 0 1 5 0 0 1 1 1 1 1 1 1 1
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	1 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 5 1 5 1 5 5 1 1 5 1	0 84 My Wealth ISA Wealth at Work Limited 1 1 1 5 5 5 5 5 5 1	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 0 0 1 5 1 0 0 1 1 1 1 1 1 1	1 83 Redmayne-Bentley Junior ISA Redmayne Bentley 5 5 0 1 5 5 5 0 0 0 0
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 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 5 1 5 1 5 5 1 5 1 5 5 1 5 5 1 5 5 1 5 5	0 84 My Wealth ISA Wealth at Work Limited 1 1 1 5 5 5 5 1 1	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 0 0 1 5 1 0 0 1 1 1 1 1 1 1	1 83 Redmayne-Bentley Junior ISA Redmayne Bentley 5 5 0 1 5 5 0 0 1 5 5 0 0 1 5 5 5 5 5 6
Auto Portfolio Rebalancing Total 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	1 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 5 1 5 1 5 5 1 5 0	0 84 My Wealth ISA Wealth at Work Limited 1 1 1 5 5 5 5 1 1 1 0	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 0 0 1 5 5 5 5 5 5 5 5 5 5 5	1 83 Redmayne-Bentley Junior ISA Redmayne Bentley 5 5 0 1 5 5 5 5 5 6 6 6 6 6 6 6 6 6 6 6 6 6 6
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 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 5 1 5 1 5 5 1 5 0 5 1 5 0	0 84 My Wealth ISA Wealth at Work Limited 1 1 1 5 5 5 5 1 1 1 0 5	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 0 0 1 5 5 5 1	1 83 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 5
Auto Portfolio Rebalancing Total 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	1 84 Redmayne-Bentley Stocks & Shares ISA Redmayne Bentley 1 5 5 1 5 1 5 5 1 5 0 5 5 1 5 5 1 5 5 1 5 5 1 5 5 7 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	0 84 My Wealth ISA Wealth at Work Limited 1 1 1 5 5 5 5 1 1 1 0 5 3	1 83 Pilling Stocks & Shares Junior ISA Execution Only Pilling & Co Stockbrokers Ltd 5 5 0 1 5 5 0 0 1 5 5 5 1 5 5 1	1 83 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 5

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			5
			0
			0
	1	5	5
		1	1
5	5	0	5
5	1	5	5
1	0	0	0
1	1	1	1
83	82	81	80
CMC Invest Stocks & Shares ISA CMC Invest	Cushon Junior ISA NatWest Cushon	InvestEngine ISA InvestEngine (UK) Limited	Investment ISA Freetrade
1	5	1	1
1	1	5	1
5	0	5	5
5	5	5	5
5	5	5	5
5	5	5	5
5	5	5	5
1	5	5	1
5	0	0	0
5	0	0	0
0		5	1
0			1
0	5	0	0
5	1	5	5
			5
5			1
0	1	1	1
	ς	1	5
			5
	1		5
			5
			1
			5
			5
			0
			1
			74
/ J		/5	/4
M&G Stocks & Shares ISA M&G Securities Ltd	Vanguard Junior ISA Vanguard Asset Management	Stocks & Shares ISA Invesco	Select ISA NFU Mutual
1	5	1	1
1	5	1	1
1	0	1	1
5	5	1	1
5	5	1 5	1 5
	5	0 5 0 5 5 5 1 1 5 1 1 0 1 1 83 82 CMC Invest Stocks & Shares ISA CMC Invest Cushon Junior ISA NatWest Cushon 1 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 5 5 5 5 1 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 5 5 5 0 5 5 5 5 5 5 0 5 5 0 0 1 1 5 0 1 1 1 1 83 82 81 1 CMC Invest Stocks & Shares ISA (MCI Invest Engine ISA) InvestEngine (UK) Limited Mawwest Cushon InvestEngine (UK) Limited 1 1 5 1 1 5 1 1 5 1 5 1 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 5 5 5 5 5 6 1 5

History			I	
Online Transaction History	C	5	5	5
Regular Premiums	5	5	5	5
Additional Permitted	5	5		5
Subscriptions	5	0	5	5
APS Transfers In Allowed	5	0	5	5
Phased Investment Option		5	<u> </u> 1	1
Bed and ISA	5	0	1	1
Transfers In From Child				
Trust Funds	0	1	0	0
In-Specie Transfers	5	1	5	5
Number of Funds	3	4	3	2
External Funds	1	1	1	5
Life Funds	1	1	1	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	5	5
Funds Non-UK	1	5	1	1
ETFs Available	1	5	1	1
Investment Trusts	1	1	1	1
	1	0	3	3
Auto Portfolio Rebalancing		0	<u> </u>	1
Total	74	74		72
Total	Chelsea FundStore Junior		M&G Stocks and Shares	
	ISA	Stocks and Shares ISA	Junior ISA	Stocks & Shares ISA
	01 1 5: 110 :	Legal & General		Chip
	Chelsea Financial Services	ŭ	M&G Securities Ltd	·
Junior ISA	5	1	M&G Securities Ltd 5	1
Junior ISA Platform/Self Select ISA	Cheisea Financial Services 5 5		M&G Securities Ltd 5 1	
	5	1	5	1
Platform/Self Select ISA	5 5	1	5 1	1
Platform/Self Select ISA Flexible ISA	5 5 0	1 1 1	5 1	1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	5 5 0 1	1 1 1 5	5 1 0 5	1 1 5 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History	5 0 1 5 0	1 1 1 5 5	5 1 0 5	1 1 5 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	5 0 1 5 0	1 1 1 5 5 5	5 1 0 5	1 1 5 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums	5 0 1 5 0	1 1 1 5 5	5 1 0 5 5 0	1 1 5 5 5 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History	5 0 1 5 0	1 1 1 5 5 5	5 1 0 5 5 0	1 1 5 5 5 5 5 5 5 5 5 5 5 5 5 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	5 5 0 1 5 0 0 5	1 1 1 5 5 5 5	5 1 0 5 5 0 5 5	1 1 5 5 5 5 5 5 5 5 5 5 5 5 5 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	5 5 0 1 5 0 0 5 0	1 1 1 5 5 5 5 5 1	5 1 0 5 5 0 5 5 0	1 1 5 5 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 APS Transfers In Allowed	5 5 0 1 5 0 0 5 0	1 1 1 5 5 5 1 1	5 1 0 5 5 0 5 5 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	5 5 0 1 5 0 0 5 0 0 1 1 1	1 1 1 5 5 5 5 1 1 1 1 1 1 1	5 1 0 5 5 5 0 5 5 0 0	1 1 5 5 5 5 6 0 0 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	5 5 0 1 5 0 0 5 0 0 1	1 1 1 5 5 5 1 1 1 1 1 1	5 1 0 5 5 5 0 5 5 0 0	1 1 5 5 5 5 6 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	5 5 0 1 5 0 0 5 0 0 1 1 1	1 1 1 5 5 5 5 1 1 1 1 1 1 1	5 1 0 5 5 5 0 5 5 0 0	1 1 5 5 5 5 6 0 0 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	5 5 0 1 5 0 0 0 5 0 0 1 1 1 5 5 0 0 0 1 1 1 5 5 0 0 0 0	1 1 1 5 5 5 5 1 1 1 1 0	5 1 0 5 5 5 0 5 5 0 0 1 5 5	1 1 5 5 5 5 6 7 7 7 8 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8
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 5 0 0 1 5 0 0 0 1 1 1 1 5 5 5 5 5 5 5	1 1 1 5 5 5 5 1 1 1 1 0 5 5	5 1 0 5 5 5 0 5 5 0 0 0 1 1 5 5	1 1 5 5 5 5 6 0 0 1 1 1 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 Trust Funds In-Specie Transfers Number of Funds	5 5 0 1 1 5 0 0 0 1 1 1 5 5 5 5 5 5 5 5	1 1 1 5 5 5 5 1 1 1 1 0 5 3	5 1 0 5 5 5 0 0 1 5 5 5 5 5 3	1 1 5 5 5 5 5 0 0 1 1 1 0 1 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 5 0 0 0 5 0 0 0 1 1 1 5 5 5 5 5 5 5 5	1 1 1 5 5 5 5 1 1 1 1 1 0 5 3 5	5 1 0 5 5 5 0 0 1 5 5 5 0 0 1 5 5 5 3 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 5 0 0 0 0 5 0 0 0 1 1 1 5 5 5 5 5 5 5	1 1 1 1 5 5 5 5 1 1 1 1 0 5 3 5 1	5 1 0 5 5 5 0 0 1 5 5 5 0 0 1 5 5 5 3 1 1	1 1 5 5 5 5 6 7 7 7 8 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8
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 5 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6	1 1 1 1 5 5 5 5 1 1 1 1 0 5 3 5 1 1 5 7	5 1 0 5 5 5 0 0 1 5 5 5 5 3 1 1 1 5	1 1 5 5 5 5 5 6 0 0 1 1 1 2 5 1 5 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 5 0 0 1 1 5 0 0 0 1 1 1 1 5 5 5 5 5 5	1 1 1 5 5 5 5 1 1 1 1 1 1 5 5 5 5 1 1 1 1 1 1 1 5 5 5 5 5 7 7 7 8 7 8 7 8 8 8 8 8 8 8 8	5 1 0 5 5 5 0 0 1 5 5 5 0 1 1 5 5 5 5 5	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 Ethical Funds Ethical Funds	5 5 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6	1 1 1 1 5 5 5 5 1 1 1 1 1 0 5 3 5 1 5 5 5 5 5 5 7 7 7 7 8 7 8 7 8 7 8 8 8 8	5 1 0 5 5 5 0 0 1 5 5 5 0 0 1 5 5 5 3 1 1 1 5 5 5 5 5	1 1 5 5 5 5 6 7 7 7 8 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8

ETFs Available	0	1	1	4
		1	1	
Investment Trusts	0	1		1
		1	0	0
Auto Portfolio Rebalancing		1	1	1
Total	71	71	71	70
	Workplace ISA Legal & General (Portfolio Mgt Services)	My Choice (ISA) Scottish Friendly	Children's ISA Ethical Option The Children's ISA Limited	Prudential ISA Prudential
Junior ISA	1	1	5	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	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	5	5	5	5
Additional Permitted				
Subscriptions	1	5	0	5
APS Transfers In Allowed	1	5	0	5
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	5
Transfers In From Child Trust Funds	0	0	5	0
In-Specie Transfers	5	1	5	1
Number of Funds	3	2	1	2
External Funds	5	1	5	1
Life Funds	1	5	1	1
Passive/Index Funds	5	5	1	5
Ethical Funds	5	5	5	1
ESG Funds	5	5	5	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
	0	0	0	3
Auto Portfolio Rebalancing		1	0	1
Total	70	69	69	68
	My Select Junior ISA	Plum ISA	NatWest Invest Junior ISA	
	Scottish Friendly	Plum	NatWest	Quilter Cheviot
Junior ISA	5	1	5	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	1	0	5
Online Applications	5	5	5	1
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	5
Online Transaction History	ς.	5	5	5
		5	5	5
Regular Premiums Additional Permitted	5	J) 	J
Subscriptions	0	0	0	5
APS Transfers In Allowed	0	0	0	5

Dhacad Investment Ontice	1	lo	lo	С
Phased Investment Option		0	0	5
Bed and ISA	1	1	1	5
Transfers In From Child Trust Funds	5	0	5	0
In-Specie Transfers	1	5	1	5
Number of Funds	2	3	1	5
External Funds	1	5	5	0
Life Funds	5	1	1	0
Passive/Index Funds	5	5	1	0
Ethical Funds	5	5	5	0
ESG Funds	5	5	5	0
Unit Trusts/OEICs	1	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	0	0	0	5
Auto Portfolio Rebalancing	1	0	0	1
Total	67	66	64	64
	RBS Invest Junior ISA Royal Bank of Scotland	My Climate Leader Choice ISA Scottish Friendly	Trading 212 Stocks ISA Trading 212	Select Junior ISA NFU Mutual
Junior ISA	5	1	1	5
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	1	5	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	1	5
Additional Permitted Subscriptions	0	5	5	0
APS Transfers In Allowed	0	1	5	0
Phased Investment Option	0	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	5	0	0	5
In-Specie Transfers	1	1	5	1
Number of Funds	1	1	5	2
External Funds	5	1	1	5
Life Funds	1	5	1	1
Passive/Index Funds	1	5	1	1
Ethical Funds	5	5	1	5
ESG Funds	5	5	1	5
Unit Trusts/OEICs	5	1	1	5
Funds Non-UK	1	1	1	1
ETFs Available	1	1	5	1
Investment Trusts	1	1	1	1
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	0	1	1	1

	Children's ISA Actively Managed Option The Children's ISA Limited	Beanstalk Junior ISA Beanstalk	CT ISA (Investment Trust) Columbia Threadneedle Investments	Jupiter ISA Jupiter Asset Management
Junior ISA	5	5	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	0	5	1
Online Applications	5	5	5	1
Online Valuations	5	5	5	5
Online Contribution History	5	5	5	0
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	1	1	1	1
Bed and ISA	1	1	1	5
Transfers In From Child Trust Funds	5	5	0	0
In-Specie Transfers	5	1	1	1
Number of Funds	2	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	1	1	5
ESG Funds	1	1	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	1	1
Auto Portfolio Rebalancing	1	1	1	1
Total	63	62	62	62
	Ninety One ISA	Children's ISA Low Cost	Bank of Scotland Ready	CT ISA (Unit Trust/OEIC)
	Ninety One	Option The Children's ISA Limited	Made Investments ISA Bank of Scotland	Columbia Threadneedle Investments
Junior ISA	1	5	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	0	5	1
Online Applications	1	5	5	1
Online Valuations	5	5	5	5
Online Contribution History	0	5	5	0
Online Transaction History	5	5	5	0
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 Consider Tourists	<u></u>	l _r	<u></u>	<u> </u>
In-Specie Transfers	5	5	1	1
Number of Funds	3	1	1	3
External Funds	1	5	1	1
Life Funds	1	1	1	1
Passive/Index Funds	1	1	1	5
Ethical Funds	5	1	1	5
ESG Funds	5	1	1	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	1	0	1	5
Auto Portfolio Rebalancing	1	1	1	1
Total	62	62	61	61
	Stakeholder Junior ISA Forester Life Ltd	Halifax Ready Made Investments ISA Halifax	Lloyds Bank Ready Made Investment ISA Lloyds Bank	Pilling Stocks & Shares Junior ISA Managed Pilling & Co Stockbrokers Ltd
Junior ISA	5	1	1	5
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	5	5	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	5
Additional Permitted Subscriptions	0	5	5	0
•	0	5	5	0
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	5
Transfers In From Child Trust Funds	5	0	0	5
In-Specie Transfers	1	1	1	1
Number of Funds	1	1	1	1
External Funds	1	1	1	5
Life Funds	5	1	1	1
Passive/Index Funds	1	1	1	5
Ethical Funds	5	1	1	1
ESG Funds	5	1	1	1
Unit Trusts/OEICs	1	5	5	5
Funds Non-UK	1	1	1	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	1	1
	0	1	1	0
Auto Portfolio Rebalancing		1	1	0
Total	61	61		61
	Junior Shariah ISA Red Rose Assurance	My Climate Leader Select Junior ISA Scottish Friendly		Beanstalk ISA Beanstalk
Junior ISA	5	5	5	1

Platform/Self Select ISA	1	l ₁	l ₁	1
Flexible ISA	0	0	0	5
	5	5		5
Online Applications			5	
Online Valuations	5	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	0	0	0	1
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	5	5	0
In-Specie Transfers	1	1	5	1
Number of Funds	1	1	1	1
External Funds	5	1	5	5
Life Funds	1	5	1	1
Passive/Index Funds	5	1	1	5
Ethical Funds	5	5	1	1
ESG Funds	5	5	1	1
Unit Trusts/OEICs	5	1	1	5
Funds Non-UK	1	1	5	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	1	1
Ilncome Options Available	0	0	0	0
	0	0 0		0
Auto Portfolio Rebalancing	0	0	0	1
	0 61	0 61	0	1 60
Auto Portfolio Rebalancing	0	0	0	1 60 Wesleyan Unit Trust ISA
Auto Portfolio Rebalancing	0 61 Investments ISA	0 61 Stakeholder ISA	0 61 Stellar AIM IHT Service Stellar Asset Management	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs
Auto Portfolio Rebalancing Total Junior ISA	0 61 Investments ISA Monzo	0 61 Stakeholder ISA Forester Life Ltd	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd
Auto Portfolio Rebalancing Total Junior ISA	0 61 Investments ISA Monzo	0 61 Stakeholder ISA Forester Life Ltd	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA	0 61 Investments ISA Monzo 1	0 61 Stakeholder ISA Forester Life Ltd 1	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA	0 61 Investments ISA Monzo 1 1	0 61 Stakeholder ISA Forester Life Ltd 1 1	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1 5	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1 1
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications	0 61 Investments ISA Monzo 1 1 0 5	0 61 Stakeholder ISA Forester Life Ltd 1 1 5 5	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1 5	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1 1 5 5
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations	0 61 Investments ISA Monzo 1 1 0 5	0 61 Stakeholder ISA Forester Life Ltd 1 1 1 5	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1 5	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1 1
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	0 61 Investments ISA Monzo 1 1 5 5 5	0 61 Stakeholder ISA Forester Life Ltd 1 1 5 5	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1 5	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1 1 5 5
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History	0 61 Investments ISA Monzo 1 1 5 5 5	0 61 Stakeholder ISA Forester Life Ltd 1 1 5 5 5	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1 5 1 1 5 5	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1 1 5 5 5
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History	0 61 Investments ISA Monzo 1 1 0 5 5 5	0 61 Stakeholder ISA Forester Life Ltd 1 1 5 5 5	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1 5 1 1 5 5 5 5	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1 1 5 5 5 5
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	0 61 Investments ISA Monzo 1 1 0 5 5 5 5	0 61 Stakeholder ISA Forester Life Ltd 1 1 5 5 5 5 5	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1 5 1 1 5 5 5 5	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1 1 5 5 5 5
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	0 61 Investments ISA Monzo 1 1 0 5 5 5 0 0	0 61 Stakeholder ISA Forester Life Ltd 1 1 5 5 5 5 5 5	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1 5 1 5 1 1 5 5 5 5 1	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1 1 5 5 5 5 5 5 5
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	0 61 Investments ISA Monzo 1 1 0 5 5 5 0 0	0 61 Stakeholder ISA Forester Life Ltd 1 1 5 5 5 5 1	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1 5 1 1 5 1 1 5 5 5 5 5 5 1	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1 1 5 5 5 5 5 5 5 5 5 5
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	0 61 Investments ISA Monzo 1 1 1 0 5 5 5 5 5 0 0 0 1 1	0 61 Stakeholder ISA Forester Life Ltd 1 1 1 5 5 5 5 1 1	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1 5 1 1 5 5 5 5 1 1 5 1	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1 1 5 5 5 5 5 5 5 1
Auto Portfolio Rebalancing Total 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	0 61 Investments ISA Monzo 1 1 1 0 5 5 5 5 5 0 0 0 1 1 1 1 1	0 61 Stakeholder ISA Forester Life Ltd 1 1 1 5 5 5 1 1 1 1 1 1	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1 5 1 1 5 5 5 5 1 1 5 1	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1 1 5 5 5 5 5 5 1 1
Auto Portfolio Rebalancing Total 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	0 61 Investments ISA Monzo 1 1 0 5 5 5 0 0 1 1 1 0 0	0 61 Stakeholder ISA Forester Life Ltd 1 1 1 5 5 5 1 1 1 1 1 0	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1 5 1 1 5 5 1 1 5 5 1 5 0	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1 1 1 5 5 5 5 5 1 1 1
Auto Portfolio Rebalancing Total 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	0 61 Investments ISA Monzo 1 1 1 0 5 5 5 5 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6	0 61 Stakeholder ISA Forester Life Ltd 1 1 1 5 5 5 1 1 1 1 0 1	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1 5 1 1 5 5 5 1 1 5 0 5	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1 1 1 5 5 5 5 5 1 1 1 0 1
Auto Portfolio Rebalancing Total 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	0 61 Investments ISA Monzo 1 1 0 5 5 5 0 0 1 1 1 0 5 1 1 1 0 5 1	0 61 Stakeholder ISA Forester Life Ltd 1 1 1 5 5 5 1 1 1 1 0 1 1 1 1 1 1 1 1	0 61 Stellar AIM IHT Service Stellar Asset Management Ltd 1 5 1 1 1 5 5 5 1 1 5 0 5 3	1 60 Wesleyan Unit Trust ISA Wesleyan Unit Trust Mgrs Ltd 1 1 1 5 5 5 5 1 1 1 0 1 2

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Passive/Index Funds	1	1	1	1
Ethical Funds	5	5	1	1
ESG Funds	5	5	1	1
Unit Trusts/OEICs	5	1	1	5
Funds Non-UK	1	1	1	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	1	1
	0	0	0	1
Auto Portfolio Rebalancing		0	1	1
Total	60	59		58
	Artemis ISA Artemis Fund Managers	Charles Stanley Direct ISA	Stocks & Shares ISA IG Trading and	Virgin Money Stocks and Shares ISA
	Ltd	Charles Stanley & Co Ltd	Investments Ltd	Virgin Money
Junior ISA	1	1	1	1
Platform/Self Select ISA	1	5	5	1
Flexible ISA	1	5	5	1
Online Applications	1	5	5	5
Online Valuations	5	5	5	5
Online Contribution				5
History	5	0	0	5
Online Transaction History	5	0	0	5
Regular Premiums	5	5	1	5
Additional Permitted				
Subscriptions	5	0	0	5
APS Transfers In Allowed	5	0	1	5
Phased Investment Option	1	0	1	1
Bed and ISA	5	5	5	1
Transfers In From Child				
Trust Funds	0	0	U	0
In-Specie Transfers	1	0	5	1
Number of Funds	2	5	5	1
External Funds	1	5	1	1
Life Funds	1	1	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	5	1	5
Funds Non-UK	1	0	1	1
ETFs Available	1	5	5	1
Investment Trusts	1	5	5	1
Income Options Available	0	0	0	1
Auto Portfolio Rebalancing	1	0	1	1
Total	57	57	57	57
	Charles Stanley Direct Junior ISA Charles Stanley & Co Ltd	OneFamily Junior ISA OneFamily		CT Junior ISA (Investment Trust) Columbia Threadneedle Investments
Junior ISA	5	5	1	5
Platform/Self Select ISA	5	1	1	1
Flexible ISA	0	0	1	0
Online Applications	5	5	5	5
Online Valuations	5	5		5

		l	I	I I
Online Contribution	0	0	1	5
History			l.	-
Online Transaction History		0	1	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	0	0	1	0
APS Transfers In Allowed	0	0	1	0
Phased Investment Option	0	1	1	1
Bed and ISA	0	1	1	1
Transfers In From Child Trust Funds	5	5	0	5
In-Specie Transfers	0	1	1	1
Number of Funds	5	1	1	2
External Funds	5	1	5	1
Life Funds	1	1	1	1
Passive/Index Funds	0	5	5	1
Ethical Funds	0	5	5	1
ESG Funds	0	5	5	1
Unit Trusts/OEICs	5	5	5	1
Funds Non-UK	0	1	1	1
ETFs Available	5	1	<u> </u>	1
Investment Trusts	5	1	1	5
	0	0	0	0
Auto Portfolio Rebalancing		1	1	1
Total	56	56	56	55
	Dunming Mitaus ICA	ISA	ISA	
	Premier Miton ISA Premier Miton Investors	Waystone Management (UK) Limited	EdenTree Investment Management Ltd	Stocks & Shares ISA McInroy & Wood
Junior ISA			EdenTree Investment	
Junior ISA Platform/Self Select ISA	Premier Miton Investors	(UK) Limited	EdenTree Investment	
	Premier Miton Investors 1	(UK) Limited 1	EdenTree Investment Management Ltd 1	McInroy & Wood
Platform/Self Select ISA	Premier Miton Investors 1	(UK) Limited 1 1	EdenTree Investment Management Ltd 1	McInroy & Wood 1
Platform/Self Select ISA Flexible ISA	Premier Miton Investors 1 1	(UK) Limited 1 1	EdenTree Investment Management Ltd 1 5	McInroy & Wood 1 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	Premier Miton Investors 1 1 1	(UK) Limited 1 1 1	EdenTree Investment Management Ltd 1 1 1	McInroy & Wood 1 1 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History	Premier Miton Investors 1 1 1 1 1	(UK) Limited 1 1 1 0 0	EdenTree Investment Management Ltd 1 1 1 1 1 1	McInroy & Wood 1 1 1 5 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History	Premier Miton Investors 1 1 1 1 1 1 1 1 1	(UK) Limited 1 1 1 0 0	EdenTree Investment Management Ltd 1 1 1 1 1 1 1 1	McInroy & Wood 1 1 1 5 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums	Premier Miton Investors 1 1 1 1 1	(UK) Limited 1 1 1 0 0	EdenTree Investment Management Ltd 1 1 1 1 1 1	McInroy & Wood 1 1 1 5 0
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions	Premier Miton Investors 1 1 1 1 1 5 1 5 5	(UK) Limited 1 1 1 0 0 5 5	EdenTree Investment Management Ltd 1 1 1 1 1 1 1 5 1 1 5 5 1 1	McInroy & Wood 1 1 1 5 0 5 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	Premier Miton Investors 1 1 1 1 1 5 1 5 5 5	(UK) Limited 1 1 1 0 0 5 5	EdenTree Investment Management Ltd 1 1 1 1 1 1 5 1 1 5 5 5	McInroy & Wood 1 1 1 5 0 5 5 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	Premier Miton Investors 1 1 1 1 1 5 1 1 1 1 1 1 1	(UK) Limited 1 1 1 0 0 5 1 1 1 1 1 1 1 1 1 1 1 1	EdenTree Investment Management Ltd 1 1 1 1 1 1 5 5 5 5 1	McInroy & Wood 1 1 1 1 5 0 5 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	Premier Miton Investors 1 1 1 1 1 5 1 5 5 5	(UK) Limited 1 1 1 0 0 5 5	EdenTree Investment Management Ltd 1 1 1 1 1 1 5 1 1 5 5 5	McInroy & Wood 1 1 1 5 0 5 5 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	Premier Miton Investors 1 1 1 1 1 5 1 1 1 1 1 1 1	(UK) Limited 1 1 1 0 0 5 1 1 1 1 1 1 1 1 1 1 1 1	EdenTree Investment Management Ltd 1 1 1 1 1 1 5 5 5 5 1	McInroy & Wood 1 1 1 1 5 0 5 5 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	Premier Miton Investors 1 1 1 1 1 5 1 1 1 1 1 1 1	(UK) Limited 1 1 1 0 0 5 1 1 1 1 1 1 1 1 1 1 1 1	EdenTree Investment Management Ltd 1 1 1 1 1 1 5 5 5 5 1	McInroy & Wood 1 1 1 1 5 0 5 5 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	Premier Miton Investors 1 1 1 1 1 5 5 1 1 1 1 5 5 1 1 1 0	(UK) Limited 1 1 1 1 0 0 5 5 1 1 0	EdenTree Investment Management Ltd 1 1 1 1 1 1 1 1 1 1 1 1 1	McInroy & Wood 1 1 1 1 5 0 5 5 1 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 Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers	Premier Miton Investors 1 1 1 1 1 5 1 1 1 1 1 1 1	(UK) Limited 1 1 1 1 0 0 5 5 1 1 0 0	EdenTree Investment Management Ltd 1 1 1 1 1 1 1 1 1 1 1 1 1	McInroy & Wood 1 1 1 1 5 0 5 1 5 0 1 1 1 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 Trust Funds In-Specie Transfers Number of Funds	Premier Miton Investors 1 1 1 1 1 5 1 1 1 1 1 1 1	(UK) Limited 1 1 1 1 0 0 5 5 1 1 0 0 4	EdenTree Investment Management Ltd 1 1 5 1 1 1 5 1 1 1 1 1 1	McInroy & Wood 1 1 1 1 5 0 5 5 1 5 0 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	Premier Miton Investors 1 1 1 1 1 1 5 1 1 1 1 1 1 1 1 1 1 1 1	(UK) Limited 1 1 1 1 0 0 5 5 1 1 0 0 0 4 5	EdenTree Investment Management Ltd 1 1 5 1 1 1 1 1 1 1 1 1 1	McInroy & Wood 1 1 1 1 5 0 5 5 1 5 0 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	Premier Miton Investors 1 1 1 1 1 5 1 1 1 1 1 1 1	(UK) Limited 1 1 1 1 0 0 0 5 5 1 1 0 0 0 1 1 1 1 1 1 1 1	EdenTree Investment Management Ltd 1 1 5 1 1 1 1 1 1 1 1 1 1	McInroy & Wood 1 1 1 1 5 0 5 5 1 5 0 1 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 Trust Funds In-Specie Transfers Number of Funds External Funds Life Funds Passive/Index Funds	Premier Miton Investors 1 1 1 1 1 5 1 1 5 1 1 5 1 1 1 5 1	(UK) Limited 1 1 1 1 0 0 0 5 5 1 1 0 0 4 5 1 5	EdenTree Investment Management Ltd 1 1 5 1 1 1 1 1 1 1 1 1 2 1 1 1	McInroy & Wood 1 1 1 1 5 0 5 5 1 5 0 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	Premier Miton Investors 1 1 1 1 1 1 5 1 1 1 1 1 1 1 1 1 1 1 1	(UK) Limited 1 1 1 1 1 0 0 0 5 5 1 1 1 0 0 4 5 1 5 5	EdenTree Investment Management Ltd 1 1 5 1 1 1 1 1 1 1 1 1 1	McInroy & Wood 1 1 1 1 5 0 5 5 1 5 1 1 1 1 1 1 1 1 1

Funds Non-UK	1	1	1	1
ETFs Available	1	1	<u> </u>	1
Investment Trusts	1	1	1	1
	1	0	<u>+</u> 1	3
Auto Portfolio Rebalancing		1	<u>+</u> 1	1
		55	<u>+</u> 54	
Total			Fundamental AIM IHT ISA	54
	Schroders Stocks & Shares	Shariah Junior ISA	(Direct)	Quilter Cheviot Ltd Junior
	ISA Schroder UTs Ltd	Forester Life Ltd	Fundamental Asset	ISA Quilter Cheviot
	Schroder OTS Eta		Management	Quiller Cheviot
Junior ISA	1	5	1	5
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	0	5	0
Online Applications	1	5	5	1
Online Valuations	1	5	5	5
Online Contribution	1	5	5	5
History	-		Ĭ	<u> </u>
Online Transaction History	1	5	5	5
Regular Premiums	5	5	1	5
Additional Permitted	5	0	5	0
Subscriptions				
APS Transfers In Allowed	1	0	0	0
Phased Investment Option	1	1	1	5
Bed and ISA	1	1	1	5
Transfers In From Child	0	5	0	5
Trust Funds				
In-Specie Transfers	1	1	5	5
Number of Funds	4	1	3	5
External Funds	1	1	1	0
Life Funds	1	5	1	0
Passive/Index Funds	1	1	1	0
Ethical Funds	5	1	1	0
ESG Funds	5	1	1	0
Unit Trusts/OEICs	5	1	1	0
Funds Non-UK	1	1	1	0
ETFs Available	1	1	1	0
Investment Trusts	5	1	1	0
Income Options Available	3	0	0	0
Auto Portfolio Rebalancing	1	0	1	1
Total	54	53	53	53
	Stocks & Shares ISA	Unicorn ISA	Stocks & Shares ISA	Margetts Junior ISA
	Triodos Bank	Unicorn Asset	BNY Mellon Fund	Margetts Fund
		Management	Managers Ltd	Management Ltd
Junior ISA	1	1	1	5
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	5		0
Online Applications	5	1	5	1
Online Valuations	5	1	5	5
Online Contribution	0	1	0	5
History			-	-
Online Transaction History		1		5
Regular Premiums	5	5	5	5

	1			
Additional Permitted Subscriptions	0	5	1	0
APS Transfers In Allowed	1	5	1	0
Phased Investment Option		1	<u>+</u> 1	1
Bed and ISA	5	1	1	1
Transfers In From Child Trust Funds	0	0	0	5
In-Specie Transfers	1	1	0	1
Number of Funds	1	2	3	3
External Funds	1	1	1	1
Life Funds	1	1	1	1
Passive/Index Funds	1	1	1	1
Ethical Funds	5	5	5	1
ESG Funds	5	5	5	1
Unit Trusts/OEICs	1	5	5	5
Funds Non-UK	5	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
Total		53	52	52
Total	Wesleyan With Profits ISA	33		
	Wesleyan Assurance	Shariah ISA	Fundsmith ISA	Liontrust ISA
	Society	Forester Life Ltd	Fundsmith LLP	Liontrust Asset Mgmt
Junior ISA	1	1	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	1	1
Online Applications	5	5	5	1
Online Valuations	5	5	1	0
Online Contribution History	5	5	1	0
Online Transaction History	5	5	1	0
Regular Premiums	5	5	5	5
Additional Permitted		ľ	I ²	
Subscriptions				
	5	5	5	5
APS Transfers In Allowed	5	5 1	5	5
APS Transfers In Allowed Phased Investment Option	5	1	5 5 1	
APS Transfers In Allowed Phased Investment Option Bed and ISA	5			5
APS Transfers In Allowed Phased Investment Option	5 1	1	1	5
APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child	5 1 1	1	1	5 1 1
APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds	5 1 1 0	1 1 0	1 1 0	5 1 1 0
APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers	5 1 1 0	1 1 0	1 1 0	5 1 1 0
APS Transfers In Allowed Phased Investment Option Bed and ISA Transfers In From Child Trust Funds In-Specie Transfers Number of Funds	5 1 1 0 1	1 1 0 1 1	1 1 0 1 1	5 1 1 0 1 3
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 1 0 1 1 1	1 1 0 1 1	1 1 0 1 1	5 1 1 0 1 3 1
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 1 0 1 1 1	1 1 0 1 1 1 5	1 0 1 1 1 1	5 1 1 1 0 1 3 1 1 1 1 1 1 1 1 1 1 1 1 1 1
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 1 0 1 1 1 1	1 1 0 1 1 1 5	1 0 1 1 1 1 1	5 1 1 0 1 3 1 1 1 5
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	5 1 1 0 1 1 1 1 1	1 1 0 1 1 1 5 1	1 1 0 1 1 1 1 1 1 1 5 5 5 5	5 1 1 0 0 1 3 1 1 1 5 5 5 5 5 1 1 1 1 1 1 1 1 1 1
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 1 1 0 1 1 1 1 1 1 1	1 1 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 0 1 1 1 1 1 1 1 1 5 5 5 5 5 5 5 5 5	5 1 1 0 1 3 1 1 5 5 5 5 5
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 1 1 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 0 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 0 1 1 1 1 1 1 1 1 5 5 5 5 1 1 1 1 1	5 1 1 1 0 0 1 3 1 1 1 5 5 5 5 5 5 1 1 1 1 1 1 1 1 1
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 ETFs Available	5 1 1 1 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 0 0 1 1 1 1 1 1 1 1 5 5 5 5 1 1 1 1	5 1 1 1 0 1 3 1 1 5 5 5 5 5 5 1 1 1 1 1 1 1 1 1 1
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 1 1 1 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 0 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 0 1 1 1 1 1 1 1 1 5 5 5 5 1 1 1 1 1	5 1 1 1 0 0 1 3 1 1 1 5 5 5 5 5 5 1 1 1 1 1 1 1 1 1

Auto Portfolio Rebalancing	0	0	0	1
	52	51	51	51
	Margetts ISA Margetts Fund Management Ltd	NatWest Invest ISA NatWest	RBS Invest ISA Royal Bank of Scotland	My Easy Choice (ISA) Scottish Friendly
Junior ISA	1	1	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	1	1
Online Applications	1	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	0	0	5
Additional Permitted Subscriptions	5	0	0	5
APS Transfers In Allowed	1	0	0	5
Phased Investment Option	1	0	0	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	0	0	0	0
In-Specie Transfers	1	1	1	1
Number of Funds	4	1	1	1
External Funds	1	5	5	1
Life Funds	1	1	1	1
Passive/Index Funds	1	1	1	1
Ethical Funds	1	5	5	1
ESG Funds	1	5	5	1
Unit Trusts/OEICs	5	5	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	1	0	0	0
Total	51	51	51	51
	Sheffield Mutual Investment ISA Sheffield Mutual Friendly Society	Wesleyan Unit Trust Junior ISA Wesleyan Unit Trust Mgrs Ltd	AXA Stocks and Shares ISA AXA Investment Managers UK Ltd	Shepherds Junior ISA Shepherds Friendly Society
Junior ISA	1	5	1	5
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	0	1	0
Online Applications	5	1	1	5
Online Valuations	5	5	1	5
Online Contribution History	5	5	1	5
Online Transaction History	5	5	1	5
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	0	5	0
APS Transfers In Allowed	5	0	5	0
Phased Investment Option	1	1	1	1

Bed and ISA	1	1	1	1
Transfers In From Child	-	-	-	-
Trust Funds	0	5	0	5
In-Specie Transfers	1	1	1	1
Number of Funds	1	2	3	1
External Funds	1	1	1	1
Life Funds	1	1	1	1
Passive/Index Funds	1	1	1	1
Ethical Funds	1	1	5	1
ESG Funds	1	1	5	1
Unit Trusts/OEICs	1	5	5	1
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	1	1
Total	51	51		50
		Henderson Investment	Marks & Spencer Stocks	50
	Fundsmith Junior ISA	Funds ISA	and Shares ISA	ESG ISA
	Fundsmith LLP	Janus Henderson Investors	M&S Bank	Red Rose Assurance
Junior ISA	5	1	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	1	1	1
Online Applications	5	1	1	5
Online Valuations	1	5	1	5
Online Contribution	1		4	0
History	1	0	1	U
Online Transaction History	1	5	1	0
Regular Premiums	5	5	5	5
Additional Permitted	0	1	5	5
Subscriptions				
	0	1	5	5
Phased Investment Option		1	1	1
	1	1	5	1
Transfers In From Child	5	0	0	0
Trust Funds				
In-Specie Transfers	1	1	1	1
Number of Funds	1	3	1	1
External Funds	1	1	1	1
Life Funds	1	1	1	1
Passive/Index Funds	1	1	5	1
Ethical Funds	5	5	1	5
ESG Funds	5	5	1	5
Unit Trusts/OEICs	5	5	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
Auto Portfolio Rebalancing		1	1	0
		49		49
	My Easy Select Junior ISA Scottish Friendly	Sheffield Mutual Investment Junior ISA	St James Place ISA St. James's Place UT Group	Stocks and Shares Junior
	Jeottisii i Henuly	investillent Juliioi 15A	or sames s Flace of Group	ISA.

		Sheffield Mutual Friendly	Ltd	NuWealth
		Society		
Junior ISA	5	5	1	5
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	0	0	0
Online Applications	5	5	1	5
Online Valuations	5	5	0	5
Online Contribution History	5	5	0	5
Online Transaction History	5	5	0	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	1	1	1	1
Transfers In From Child	-	F	0	F
Trust Funds	5	5	0	5
In-Specie Transfers	1	1	1	1
Number of Funds	1	1	3	3
External Funds	1	1	1	0
Life Funds	1	1	1	0
Passive/Index Funds	1	1	1	0
Ethical Funds	1	1	5	0
ESG Funds	1	1	5	0
Unit Trusts/OEICs	1	1	5	0
Funds Non-UK	1	1	1	0
ETFs Available	1	1	1	0
Investment Trusts	1	1	1	0
Income Options Available	0	0	3	0
Auto Portfolio Rebalancing	0	0	1	5
Total	49	49	49	47
	Junior ESG ISA	Unicorn JISA Unicorn Asset	Vanguard Managed ISA Vanguard Asset	ConBrio ISA
	Red Rose Assurance	Management	Management	ConBrio
Junior ISA	5	5	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	0	5	1
Online Applications	5	1	5	1
Online Valuations	5	1	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	0	5	5
APS Transfers In Allowed	0	0	1	0
Phased Investment Option	1	1	1	0
Bed and ISA	1	1	1	0
Transfers In From Child Trust Funds	5	5	0	0
In-Specie Transfers	1	1	1	1
	<u> </u>	<u> </u>	I	<u> </u>

Number of Funds	1	2	1	2
External Funds	1	1	0	1
Life Funds	1	1	0	1
Passive/Index Funds	1	1	0	1
Ethical Funds	5	5	0	5
ESG Funds	5	5	0	5
Unit Trusts/OEICs	1	5	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	5
Auto Portfolio Rebalancing	0	1	5	0
Total	47	47	47	46
	Scottish Friendly My	FP WHEB Asset	OneFamily Stocks &	Orbis Stocks & Shares ISA
	Sovereign Investment ISA		Shares ISA	Orbis
	Forces Mutual	FundRock Partners Limited	OneFamily	
Junior ISA	1	1	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	1	1
Online Applications	5	1	5	5
Online Valuations	5	1	5	5
Online Contribution	5	1	5	0
History				
Online Transaction History	5	1	5	0
Regular Premiums	5	5	5	5
Additional Permitted	5	5	1	5
Subscriptions				
	0	1	1	5
Phased Investment Option	1	1	0	1
Bed and ISA	1	1	0	1
Transfers In From Child	0	0	0	0
Trust Funds				
In-Specie Transfers	1	1	1	1
Number of Funds	1	1	1	1
External Funds	1	1	1	1
Life Funds	1	1	1	1
Passive/Index Funds	1	1	1	1
Ethical Funds	1	5	1	1
ESG Funds	1	5	1	1
Unit Trusts/OEICs	1	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	3	0	0
Auto Portfolio Rebalancing	0	0	1	1
Total	46	46	46	46
	WAY Stocks and Shares	First Sentier Investors		
	ISA	Stocks and Shares ISA	Liontrust Junior ISA	LV= ISA
	WAY Fund Managers Ltd	First Sentier Investors (UK)	Liontrust Asset Mgmt	LV=
lunion ICA		Funds Ltd	_	4
Junior ISA	1	1	5	1
Platform/Self Select ISA	1	1	1	1

Flexible ISA	1	1	0	1
Online Applications	1	1	1	5
Online Valuations	1	1	0	5
Online Contribution				-
History	1	1	0	5
Online Transaction History	1	1	0	1
Regular Premiums	5	5	5	1
Additional Permitted	5	5	0	5
Subscriptions			Ĭ	
APS Transfers In Allowed	1	1	0	5
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child	0	0	1	0
Trust Funds				
In-Specie Transfers	1	1	1	1
Number of Funds	3	2	3	1
External Funds	1	1	1 -	1
Life Funds	1	1	[1 r	1
Passive/Index Funds	1	1	5	1
Ethical Funds	5	5	5 I-	1
ESG Funds	5	5	5	1
Unit Trusts/OEICs			5	1
Funds Non-UK	1	1	1	1
ETFs Available	1		1	1
Investment Trusts Income Options Available	0	0	0	1
Income Options Available	()			
			-	
Auto Portfolio Rebalancing	1	1	1	1
	1 46		1	1 45
Auto Portfolio Rebalancing	1 46 St James Place Junior ISA	1 45 Unity Mutual Flexible ISA	1 45 Wealthify Junior ISA	1
Auto Portfolio Rebalancing	1 46	1 45 Unity Mutual Elevible ISA	1 45	1 45 FP Octopus Investment
Auto Portfolio Rebalancing	1 46 St James Place Junior ISA St. James's Place UT Group	1 45 Unity Mutual Flexible ISA	1 45 Wealthify Junior ISA	1 45 FP Octopus Investment Funds ISA
Auto Portfolio Rebalancing Total	1 46 St James Place Junior ISA St. James's Place UT Group Ltd	1 45 Unity Mutual Flexible ISA Unity Mutual	1 45 Wealthify Junior ISA Wealthify Limited	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited
Auto Portfolio Rebalancing Total Junior ISA	1 46 St James Place Junior ISA St. James's Place UT Group Ltd 5	1 45 Unity Mutual Flexible ISA Unity Mutual	1 45 Wealthify Junior ISA Wealthify Limited	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA	1 46 St James Place Junior ISA St. James's Place UT Group Ltd 5	1 45 Unity Mutual Flexible ISA Unity Mutual	1 45 Wealthify Junior ISA Wealthify Limited	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA	1 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1	1 45 Wealthify Junior ISA Wealthify Limited 5 1	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications	1 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1 0 1	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1 5 5 5	1 45 Wealthify Junior ISA Wealthify Limited 5 1 0	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1 1
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History	1 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1 0 1 0	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1 5	1 45 Wealthify Junior ISA Wealthify Limited 5 1 0	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1 1
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	1 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1 0 1 0	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1 5 5 5	1 45 Wealthify Junior ISA Wealthify Limited 5 1 0	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1 1
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 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1 0 1 0	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1 5 5 5 1	1 45 Wealthify Junior ISA Wealthify Limited 5 1 0 5 5 5	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1 1 1
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History	1 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1 0 1 0 0 0	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1 5 5 1	1 45 Wealthify Junior ISA Wealthify Limited 5 1 0 5 5 5	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1 1 1 1 1
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 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1 0 1 0 0 0 5	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1 5 5 1 1 1 5	1 45 Wealthify Junior ISA Wealthify Limited 5 1 0 5 5 5	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1 1 1 1 1
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 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1 0 0 0 0 5 0 0	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1 5 5 1 1 1 5 5 5	1 45 Wealthify Junior ISA Wealthify Limited 5 1 0 5 5 5 5 0	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1 1 1 1 5 5
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 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1 0 0 0 0 5 0 0	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1 5 5 5 1 1 5 0	1 45 Wealthify Junior ISA Wealthify Limited 5 1 0 5 5 5 0 0	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1 1 1 1 5 5 1
Auto Portfolio Rebalancing Total 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	1 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1 0 1 0 0 5 0 0 1 1 1 1 1 1 1 1 1 1 1	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1 5 5 5 5 0 1	1 45 Wealthify Junior ISA Wealthify Limited 5 1 0 5 5 5 0 0 0 1	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1 1 1 5 5 1 1 1 1 1 1 1 1 1 1 1 1 1
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 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1 0 1 0 0 5 0 1 1 1 1 1	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1 5 5 5 6 0 1 1 1	1 45 Wealthify Junior ISA Wealthify Limited 5 1 0 5 5 5 0 0 0 1	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Auto Portfolio Rebalancing Total 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	1 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1 0 1 0 0 0 5 0 1 1 1 5	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1 5 5 5 0 1 1 1 0	1 45 Wealthify Junior ISA Wealthify Limited 5 1 0 5 5 5 0 0 1 1 1 5	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
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 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1 0 1 0 0 5 0 1 1 1 5 1 1 1 5 1	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1 5 5 5 0 1 1 1 0 0	1 45 Wealthify Junior ISA Wealthify Limited 5 1 0 5 5 5 0 0 1 1 1 5	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Auto Portfolio Rebalancing Total 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	1 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1 0 0 1 0 0 0 1 1 1 5 1 1 1 5 1 1 3	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1 5 5 6 0 1 1 1 0 0 1 1 1	1 45 Wealthify Junior ISA Wealthify Limited 5 1 0 5 5 5 0 0 1 1 1 5 0 2	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1 1 1 1 1 1 1 1 1 0 1 1 1 1 1 1 1 1
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 Number of Funds External Funds	1 46 St James Place Junior ISA St. James's Place UT Group Ltd 5 1 0 1 0 0 0 5 0 1 1 1 1 1 1 5 1 1 1 1	1 45 Unity Mutual Flexible ISA Unity Mutual 1 1 5 5 5 0 1 1 1 0 0 0 1	1 45 Wealthify Junior ISA Wealthify Limited 5 1 0 5 5 5 5 0 0 1 1 1 5 0 2 0	1 45 FP Octopus Investment Funds ISA FundRock Partners Limited 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1

Ethical Funds	5	1	0	5
ESG Funds	5		0	5
	5	1	0	5
Unit Trusts/OEICs			0	
Funds Non-UK	1	1	<u> </u>	1
ETFs Available	1	1	0	1
Investment Trusts	1	1	0	1
	0	0	0	0
Auto Portfolio Rebalancing		0	5	1
Total	45		45	44
	Healthy Investment Ethical ISA Healthy Investment	Healthy Investment Ethical ISA -Adviser charging Healthy Investment	Netwealth ISA Netwealth	Orbis Junior Stocks & Shares ISA Orbis
Junior ISA	1	1	1	5
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	1	0
Online Applications	5	5	5	5
Online Valuations	0	0	5	5
Online Contribution History	0	0	5	0
Online Transaction History	0	0	5	0
Regular Premiums	5	5	5	5
Additional Permitted Subscriptions	5	5	5	0
APS Transfers In Allowed	5	5	5	0
Phased Investment Option		1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child	1	1	<u> </u>	1
Trust Funds	0	0	0	5
In-Specie Transfers	1	1	1	1
Number of Funds	1	1	2	1
External Funds	1	1	0	1
Life Funds	1	1	0	1
Passive/Index Funds	1	1	0	1
Ethical Funds	5	5	0	1
ESG Funds	5	5	0	1
Unit Trusts/OEICs	1	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	0	0	1	1
Total	44	44	44	44
	Unity Mutual Junior ISA Unity Mutual	FP Foresight ISA FundRock Partners Limited	Junior ISA Waystone Management (UK) Limited	Healthy With Profits Junior ISA Healthy Investment
Junior ISA	5	1	5	5
Platform/Self Select ISA	1	1	1	1
Flexible ISA	0	1	0	0
Online Applications	5	1	1	5
Online Valuations	5	1	0	0
Online Contribution	1	1	o	0

History				
Online Transaction History	1	1	0	0
Regular Premiums	5	5	5	5
Additional Permitted				
Subscriptions	0	5	0	0
APS Transfers In Allowed	0	1	0	0
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	5	0	1	5
In-Specie Transfers	0	1	0	1
Number of Funds	1	1	2	1
External Funds	1	1	5	1
Life Funds	5	1	1	1
Passive/Index Funds	1	1	1	1
Ethical Funds	1	5	5	5
ESG Funds	1	5	5	5
Unit Trusts/OEICs	1	5	5	1
Funds Non-UK	1	1	1	1
ETFs Available	1	1	<u> </u>	1
Investment Trusts	1	1	1	1
	0	0		0
Auto Portfolio Rebalancing		0	 1	0
Total		43		42
Total	Healthy With Profits	45	45	Fundamental AIM IHT ISA
	Junior ISA - Adviser	Netwealth Junior ISA	Saxo ISA	(Platform)
	charging	Netwealth	Saxo Capital Markets UK	Fundamental Asset
	charging Healthy Investment	Netwealth	Limited	Fundamental Asset Management
Junior ISA		Netwealth 5		
Junior ISA Platform/Self Select ISA	Healthy Investment		Limited	Management
	Healthy Investment 5	5	Limited 1	Management 1
Platform/Self Select ISA	Healthy Investment 5 1	5 1	Limited 1 5	Management 1 5
Platform/Self Select ISA Flexible ISA	Healthy Investment 5 1	5 1 0	Limited 1 5 5	Management 1 5
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	Healthy Investment 5 1 0 5	5 1 0 5	Limited 1 5 5 5	Management 1 5 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History	Healthy Investment 5 1 0 5 0	5 1 0 5 5 5	Limited 1 5 5 5	Management 1 5 1 1 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History	Healthy Investment 5 1 0 5 0 0	5 1 0 5 5 5	Limited 1 5 5 5 0 0	Management 1 5 1 1 1 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums	Healthy Investment 5 1 0 5 0	5 1 0 5 5 5	Limited 1 5 5 5 0	Management 1 5 5 1 1
Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History Regular Premiums Additional Permitted Subscriptions	Healthy Investment 5 1 0 5 0 0 0 0	5 1 0 5 5 5 5 5 5	Limited 1 5 5 5 0 0	Management 1 5 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	Healthy Investment 5 1 0 5 0 0 5 1	5 1 0 5 5 5 5	Limited 1 5 5 5 0 0 0	Management 1 5 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	Healthy Investment 5 1 0 5 0 0 0 0 0 0	5 1 0 5 5 5 5 5 5	Limited 1 5 5 5 0 0 0 0	Management 1 5 5 1 1 1 1 5 5 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	Healthy Investment 5 1 0 5 0 0 0 0 0 0	5 1 0 5 5 5 5 5 5 0	Limited 1 5 5 5 6 0 0 0 0 0	Management 1 5 5 1 1 1 1 1 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 Phased Investment Option	Healthy Investment 5 1 0 5 0 0 5 0 0 1 1	5 1 0 5 5 5 5 5 0 0	Limited 1 5 5 5 5 0 0 0 0 0 0	Management 1 5 1 1 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	Healthy Investment 5 1 0 5 0 0 5 0 0 1 1	5 1 0 5 5 5 5 5 0 0 0	Limited 1 5 5 5 5 0 0 0 0 0 0 0 0	Management 1 5 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	Healthy Investment 5 1 0 5 0 0 0 1 1 1 1 5 1 1 1 1	5 1 0 5 5 5 5 0 0 1 1 1 5	Limited 1 5 5 5 5 0 0 0 0 0 0 0 0 0 0 0 0	Management 1 5 5 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	Healthy Investment 5 1 0 5 0 0 0 1 1 1 1 1 5 1	5 1 0 5 5 5 5 6 0 0 1 1 1 5 1	Limited 1 5 5 5 5 0 0 0 0 0 0 0 0 0 0 0 0 0	Management 1 5 5 1 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 Trust Funds In-Specie Transfers Number of Funds	Healthy Investment 5 1 0 5 0 0 0 1 1 1 5 1 1 1 5 1	5 1 0 5 5 5 5 6 0 0 1 1 1 5 1 2	Limited 1 5 5 5 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Management 1 5 5 1 1 1 1 1 1 1 1 0 5 3
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	Healthy Investment 5 1 0 5 0 0 0 0 1 1 1 1 1 1	5 1 0 5 5 5 5 6 0 0 1 1 1 5 1 2 0	Limited 1 5 5 5 5 6 0 0 0 0 0 0 0 0 0 0 0 0 5 1	Management 1 5 5 1 1 1 1 1 1 1 1 5 0 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	Healthy Investment 5 1 0 5 0 0 0 1 1 1 1 1 1 1	5 1 0 5 5 5 5 5 0 0 1 1 1 5 1 2 0 0	Limited 1 5 5 5 5 0 0 0 0 0 0 0 0 0 0 5 1 1	Management 1 5 5 1 1 1 1 1 1 1 1 1 5 0 5 3 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	Healthy Investment 5 1 0 5 0 0 0 1 1 1 5 1 1 1 1 1	5 1 0 5 5 5 5 5 6 0 0 1 1 1 5 1 2 0 0 0 0 0	Limited 1 5 5 5 5 6 0 0 0 0 0 0 0 0 0 0 0 5 1 1 1	Management 1 5 5 5 1 1 1 1 1 1 1 1 0 5 0 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	Healthy Investment 5 1 0 5 0 0 0 1 1 1 1 1 1 1 1 1	5 1 0 5 5 5 5 5 0 0 1 1 1 5 1 2 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Limited 1 5 5 5 5 5 0 0 0 0 0 0 0 0 0 0 0 5 1 1 1 0 1	Management 1 5 5 1 1 1 1 1 1 1 1 5 0 1 1 1 1 1 1 1 1 1 1 1 1

Funds Non-UK	1	0	1	1
ETFs Available	1	0	5	1
Investment Trusts	1	0	5	1
	0	0	0	0
Auto Portfolio Rebalancing		1	0	1
Total	42	42		41
	Smart Portfolio ISA IG Trading and Investments Ltd	Nutmeg Junior ISA Nutmeg	Shepherds Stocks and Shares ISA Shepherds Friendly Society	UBS ISA UBS
Junior ISA	1	5	1	1
Platform/Self Select ISA	5	1	1	1
Flexible ISA	5	0	1	1
Online Applications	5	5	5	1
Online Valuations	5	5	5	1
Online Contribution History	5	5	0	1
Online Transaction History	5	5	0	1
Regular Premiums	1	1	5	5
Additional Permitted Subscriptions	0	0	5	5
	1	0	5	5
Phased Investment Option		1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	0	5	0	0
In-Specie Transfers	0	1	1	1
Number of Funds	1	1	1	2
External Funds	0	0	1	1
Life Funds	0	0	1	1
Passive/Index Funds	0	0	1	1
Ethical Funds	0	0	1	1
ESG Funds	0	0	1	1
Unit Trusts/OEICs	0	0	1	5
Funds Non-UK	0	0	1	1
ETFs Available	0	0	1	1
Investment Trusts	0	0	1	1
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	5	5	0	1
	41	41	41	41
	Wealthify Investment ISA Wealthify Limited	IFSL ISA Investment Fund Services Ltd	McInroy & Wood	Nutmeg Stocks & Shares ISA Nutmeg
Junior ISA	1	1	5	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	5	1	0	1
Online Applications	5	1	1	5
Online Valuations	5	1	5	5
Online Contribution	5	1	0	5
History		-		
Online Transaction History		1	0	5
Regular Premiums	5	5	5	5
Additional Permitted	0	5	0	1

Subscriptions				
	0	l _r	lo.	14
		5	0	1
Phased Investment Option		1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	0	0	5	0
In-Specie Transfers	0	1	1	1
Number of Funds	2	3	1	2
External Funds	0	1	1	0
Life Funds	0	1	1	0
Passive/Index Funds	0	0	1	0
Ethical Funds	0	1	1	0
ESG Funds	0	1	1	0
Unit Trusts/OEICs	0	5	5	0
Funds Non-UK	0	1	1	0
ETFs Available	0	1	1	0
Investment Trusts	0	1	1	0
Income Options Available	0	0	0	0
Auto Portfolio Rebalancing	5	0	1	5
Total	41	40	40	40
	Sarasin ISA	Compuie IICA	ED Avalla ICA	ED Volene ICA
	Sarasin Investment Funds	ConBrio JISA ConBrio	FP Apollo ISA FundRock Partners Limited	FP Volare ISA FundRock Partners Limited
	Ltd	CONDITIO	- anattock ratellers Ellitea	- ananoek rareners Emiliea
Junior ISA	1	5	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	0	1	1
Online Applications	1	1	1	1
Online Valuations	1	1	1	1
Online Contribution History	1	1	1	1
Online Transaction History	1	1	1	1
Regular Premiums	1	5	5	5
Additional Permitted Subscriptions	0	0	5	5
APS Transfers In Allowed	1	0	1	1
Phased Investment Option	1	0	1	1
Bed and ISA	1	0	1	1
Transfers In From Child Trust Funds	0	0	0	0
In-Specie Transfers	1	1	1	0
Number of Funds	2	2	1	2
External Funds	1	1	1	1
Life Funds	1	1	1	1
Passive/Index Funds	1	1	1	1
Ethical Funds	5	5	1	1
ESG Funds	5	5	1	1
Unit Trusts/OEICs	5	5	5	5
Funds Non-UK	5	1	1	1
ETFs Available	1	1	1	1
Investment Trusts	1	1	1	1
	0	0	3	3
medine options Available		·		•

Auto Portfolio Rebalancing	1	0	1	1
Total	40	39	39	39
			Sheffield Mutual	
	IFSL Junior ISA Investment Fund Services Ltd	Stocks and Shares ISA NuWealth	Sustainable ISA Sheffield Mutual Friendly Society	Stocks & Shares ISA Allianz Global Investors
Junior ISA	5	1	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	1	1
Online Applications	1	5	5	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	5	5
Additional Permitted Subscriptions	0	0	1	5
APS Transfers In Allowed	0	0	1	1
Phased Investment Option	1	1	1	1
Bed and ISA	1	1	1	1
Transfers In From Child Trust Funds	5	0	0	0
In-Specie Transfers	1	1	1	1
Number of Funds	3	3	1	2
External Funds	1	0	1	1
Life Funds	1	0	1	1
Passive/Index Funds	0	0	1	1
Ethical Funds	1	0	5	1
ESG Funds	1	0	5	1
Unit Trusts/OEICs	5	0	1	5
Funds Non-UK	1	0	1	1
ETFs Available	1	0	1	1
Investment Trusts	1	0	1	1
Income Options Available	0	0	0	1
Auto Portfolio Rebalancing	0	5	0	1
Total	39	39	39	38
	Puma AIM IHT ISA Puma Investments	Wahed Invest ISA Wahed Invest	Metfriendly Junior ISA Metfriendly	Moneybox Junior ISA Moneybox
Junior ISA	1	1	5	5
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	0	0
Online Applications	1	5	5	5
Online Valuations	5	5	1	5
Online Contribution History	0	5	1	5
Online Transaction History	0	5	1	5
Regular Premiums	1	5	5	5
Additional Permitted Subscriptions	5	0	0	0
APS Transfers In Allowed	5	1	0	0
Phased Investment Option	1	1	1	1
Bed and ISA	1	0	1	1

Transfers In From Child	0	0	5	1
Trust Funds	U	U	5	1
In-Specie Transfers	1	1	1	1
Number of Funds	5	2	1	1
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	1	5	0	1
Total	38	38	37	37
	FP Russell ISA FundRock Partners Limited	Shrewd Savings Plan ISA NFU Mutual	Moneybox ISA Moneybox	Rathbone Greenbank Multi-Asset Portfolios ISA Rathbones Asset Management Limited
Junior ISA	1	1	1	1
Platform/Self Select ISA	1	1	1	1
Flexible ISA	1	1	1	1
Online Applications	1	1	5	1
Online Valuations	1	1	5	1
Online Contribution History	1	1	5	1
Online Transaction History	1	1	5	1
	5	5	5	1
Additional Permitted	_	_		
Subscriptions	5	5	0	0
APS Transfers In Allowed	1	5	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				Ĭ
'	0	1	1	1
Number of Funds	2	1	1	1
External Funds	1	1	0	1
Life Funds	1	1	0	1
Passive/Index Funds	1	1	0	1
Ethical Funds	1	1	0	5
ESG Funds	1	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	1	1
		35	34	34
		Artemis Junior ISA Artemis Fund Managers	Octopus AIM Inheritance Tax ISA	Rathbone Single Strategy Fund ISA

Platform/Self Select ISA		Slater Investments Limited	Ltd	Octopus Investments	Rathbones Asset
Platform/Self Select ISA					Management Limited
Deline Applications 1	Junior ISA	5	5	1	1
Dniline Applications	Platform/Self Select ISA	1	1	1	1
Dniline Valuations	Flexible ISA	0	0	1	1
Drilline Contribution 1	Online Applications	1	1	1	1
	Online Valuations	1	1	5	0
Regular Premiums 5 5 1 1 1 Additional Permitted Subscriptions 0 0 1 0 0 1 0 0 1 <td< td=""><td>Online Contribution History</td><td>1</td><td>0</td><td>0</td><td>0</td></td<>	Online Contribution History	1	0	0	0
Additional Permitted subscriptions Bed and ISA 1	Online Transaction History	1	0	0	0
Name	Regular Premiums	5	5	1	1
Subscriptions	Additional Permitted	0	0	1	0
Phased Investment Option 1	Subscriptions	U	U	1	U
Seed and ISA	APS Transfers In Allowed	0	0	1	1
Transfers in From Child Trust Funds 1	Phased Investment Option	1	1	1	1
Trust Funds	Bed and ISA	1	1	1	1
Number of Funds	Transfers In From Child Trust Funds	1	1	0	0
External Funds	In-Specie Transfers	1	1	1	1
Passive/Index Funds	Number of Funds	1	2	3	2
Passive/Index Funds 1 1 1 1 1 5 5 5 5 5 5 5 5 5 5 5 5 5 5	External Funds	1	1	5	1
Ethical Funds	Life Funds	1	1	1	1
SEG Funds	Passive/Index Funds	1	1	1	1
Dulit Trusts/OEICs 5 5 1 5 5 5 1 5 5 5	Ethical Funds	1	1	1	5
Funds Non-UK	ESG Funds	1	1	1	5
TFIS Available	Unit Trusts/OEICs	5	5	1	5
Investment Trusts	Funds Non-UK	1	1	1	1
Anto Portfolio Rebalancing 1	ETFs Available	1	1	1	1
Auto Portfolio Rebalancing 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Investment Trusts	1	1	1	1
Mi Funds ISA	Income Options Available	0	0	1	0
Mil Funds ISA Apex Fundrock Ltd Slater Stocks & Shares ISA Interactive Investor ISA Metfriendly Metfriendly	Auto Portfolio Rebalancing	1	1	1	1
Sample S	Total	34	33	33	33
Apex Fundrock Ltd Slater Investments Limited Interactive Investor IsA Metfriendly		MI Funds ISA	Slator Stacks & Shares ISA	Managed ISA	Metfriendly Lump Sum
Platform/Self Select ISA 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1				Interactive Investor	
Flexible ISA	Junior ISA	1	1	1	1
Online Applications 1 1 5 5 Online Valuations 1 1 5 1 Online Contribution History 1 1 0 1 Online Transaction History 1 1 0 1 Regular Premiums 0 5 5 1 Additional Permitted Subscriptions 5 1 0 5 APS Transfers In Allowed 0 1 0 0 Phased Investment Option 1 1 1 1 Bed and ISA 1 1 1 1	Platform/Self Select ISA	1	1	5	1
Online Valuations 1 1 5 1 Online Contribution History 1 1 0 1 Online Transaction History 1 1 0 1 Regular Premiums 0 5 5 1 Additional Permitted Subscriptions 5 1 0 5 APS Transfers In Allowed 0 1 0 0 Phased Investment Option 1 0 1 Bed and ISA 1 1 1 1	Flexible ISA	1	1	1	1
Dolline Contribution	Online Applications	1	1	5	5
History 1 1 0 1 1 0 1 1 1 1 1 1 1 1 1 1 1 1 1	Online Valuations	1	1	5	1
Regular Premiums 0 5 1 Additional Permitted Subscriptions 5 1 0 5 APS Transfers In Allowed 0 1 0 0 Phased Investment Option 1 1 0 1 Bed and ISA 1 1 1 1	Online Contribution History	1	1	0	1
Additional Permitted 5	Online Transaction History	1	1	0	1
Subscriptions 5 1 0 5 APS Transfers In Allowed 0 1 0 0 Phased Investment Option 1 1 0 1 Bed and ISA 1 1 1 1	Regular Premiums	0	5	5	1
Subscriptions 1 0 0 APS Transfers In Allowed 0 1 0 1 Phased Investment Option 1 1 0 1 Bed and ISA 1 1 1 1	Additional Permitted	F		0	-
Phased Investment Option 1 1 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Subscriptions	J	1	U	o O
Bed and ISA 1 1 1 1	APS Transfers In Allowed	0	1	0	0
	Phased Investment Option	1	1	0	1
· · · · · · · · · · · · · · · · · · ·	Bed and ISA	1	1	1	1
10 10 10 10	Transfers In From Child Trust Funds	0	0	0	0
in-Specie Transfers 1 1 1 1	In-Specie Transfers	1	1	1	1

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

Elevible ICA	I ₄	l ₄	lo.	F
Flexible ISA	1	1	0	5
Online Applications	1	1	5	1
Online Valuations	0	1	0	1
Online Contribution History	0	1	0	1
Online Transaction History	0	1	0	1
Regular Premiums	1	1	5	1
Additional Permitted Subscriptions	0	5	О	0
APS Transfers In Allowed	1	5	0	0
Phased Investment Option	1	0	0	0
Bed and ISA	1	0	1	0
Transfers In From Child Trust Funds	0	0	5	0
In-Specie Transfers	1	1	0	5
Number of Funds	2	0	0	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	0
Unit Trusts/OEICs	5	0	0	0
Funds Non-UK	1	0	0	0
ETFs Available	1	0	0	0
Investment Trusts	1	0	0	0
	-	<u> </u>	<u> </u>	0
Income Ontions Available	lo.	lo .	lo .	lo I
	0	0	0	0
Auto Portfolio Rebalancing	1	5	0	0
			0 22	
Auto Portfolio Rebalancing	1	5 24	0	0
Auto Portfolio Rebalancing	1 25	5	0 22 Unicorn AIM IHT ISA	0 18
Auto Portfolio Rebalancing	1 25 DIY ISA	5 24 Managed ISA	0 22 Unicorn AIM IHT ISA Portfolio Service	0 18 Credo ISA
Auto Portfolio Rebalancing	1 25 DIY ISA	5 24 Managed ISA	0 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset	0 18 Credo ISA
Auto Portfolio Rebalancing Total	1 25 DIY ISA Moneyfarm	5 24 Managed ISA Moneyfarm 1	0 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset	0 18 Credo ISA Credo
Auto Portfolio Rebalancing Total Junior ISA	1 25 DIY ISA Moneyfarm	5 24 Managed ISA Moneyfarm	0 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset	0 18 Credo ISA Credo
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA	1 25 DIY ISA Moneyfarm 1	5 24 Managed ISA Moneyfarm 1	0 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset Management 1	0 18 Credo ISA Credo 1
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA	1 25 DIY ISA Moneyfarm 1 1 5	5 24 Managed ISA Moneyfarm 1 1	0 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset Management 1 1	0 18 Credo ISA Credo 1 5
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications	1 25 DIY ISA Moneyfarm 1 1 5 5	5 24 Managed ISA Moneyfarm 1 1 5 5	0 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset Management 1 1	0 18 Credo ISA Credo 5 5 5 0 0
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution	1 25 DIY ISA Moneyfarm 1 1 5 0 0	5 24 Managed ISA Moneyfarm 1 1 5 5 0	0 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset Management 1 1 1	0 18 Credo ISA Credo 5 5 0 0 0
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History	1 25 DIY ISA Moneyfarm 1 1 5 0 0	5 24 Managed ISA Moneyfarm 1 1 5 5 0	0 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset Management 1 1 1 1	0
Auto Portfolio Rebalancing Total Junior ISA Platform/Self Select ISA Flexible ISA Online Applications Online Valuations Online Contribution History Online Transaction History	1 25 DIY ISA Moneyfarm 1 1 5 0 0 0	5 24 Managed ISA Moneyfarm 1 1 5 5 0 0	0 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset Management 1 1 1 1 1	0 18 Credo ISA Credo 1 5 0 0 0 0
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 25 DIY ISA Moneyfarm 1 1 5 5 0 0 0 0 5 5	5 24 Managed ISA Moneyfarm 1 1 5 5 0 0 0 5	0 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset Management 1 1 1 1 1	0 18 Credo ISA Credo 1 5 0 0 0 0 0 0
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 25 DIY ISA Moneyfarm 1 1 5 5 0 0 0 0 5 0 0 0 0 0 0 0 0 0 0 0	5 24 Managed ISA Moneyfarm 1 1 5 5 0 0 0 5	0 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset Management 1 1 1 1 1 1 0 0	0
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 25 DIY ISA Moneyfarm 1 1 5 5 0 0 0 0 5 0 0 0 0 0 0 0 0 0 0 0	5 24 Managed ISA Moneyfarm 1 1 5 5 0 0 0 0 0 0 0	0 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset Management 1 1 1 1 1 1 0 0	0 18 Credo ISA Credo 1 5 5 0 0 0 0 0 0 0 0
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	1 25 DIY ISA Moneyfarm 1 1 5 5 5 0 0 0 5 0 0 0 0 0 0 0 0 0 0 0	5 24 Managed ISA Moneyfarm 1	O 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset Management 1 1 1 1 1 0 0 0 1	0
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 25 DIY ISA Moneyfarm 1 1 5 5 6 0 0 0 0 0 0 0 0 0 0 0 0 0 1 1	5 24 Managed ISA Moneyfarm 1	O 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset Management 1 1 1 1 1 0 0 0 1	0
Auto Portfolio Rebalancing Total 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	1 25 DIY ISA Moneyfarm 1 1 1 5 5 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6	5 24 Managed ISA Moneyfarm 1 1 1 5 5 6 0 0 0 0 0 5 0 0 0 0 0 1 1 0 0 0 0 0 0 0	O 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset Management 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	0 18 Credo ISA Credo O 1 1 5 5 5 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
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 25 DIY ISA Moneyfarm 1 1 1 5 5 5 0 0 0 0 5 0 0 0 1 0 0 0 0 0	5 24 Managed ISA Moneyfarm 1	O 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset Management 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	0
Auto Portfolio Rebalancing Total 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	1 25 DIY ISA Moneyfarm 1 1 1 5 5 6 0 0 0 0 0 0 0 1 1 0 0 0 0 0 0 0 0 0 0	5 24 Managed ISA Moneyfarm 1 1 5 5 0 0 0 0 5 0 0 0 0 1 1 0 0 0 0 0	O 22 Unicorn AIM IHT ISA Portfolio Service Unicorn Asset Management 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	0

Passive/Index Funds	0	lo	lo	0
Ethical Funds	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
Investment Trusts	0	0	0	0
	0	0		0
Auto Portfolio Rebalancing		0	1	0
Total	18	18		11
	Platform One Stocks & Shares Junior ISA Platform One	BlackRock NISA BlackRock	Platform One Stocks & Shares ISA Platform One	ISA Rathbones Investment Management
Junior ISA	5	1	1	1
Platform/Self Select ISA	5	1	5	1
Flexible ISA	0	0	0	0
Online Applications	0	0	0	0
Online Valuations	0	0	0	0
Online Contribution History	0	0	0	0
Online Transaction History	0	0	0	0
Regular Premiums	0	5	0	0
Additional Permitted Subscriptions	0	0	0	0
APS Transfers In Allowed	0	0	0	0
Phased Investment Option	0	0	0	0
Bed and ISA	0	0	0	0
Transfers In From Child Trust Funds	0	0	0	0
In-Specie Transfers	0	0	0	0
Number of Funds	0	0	0	0
External Funds	0	0	0	0
Life Funds	0	0	0	0
Passive/Index Funds	0	0	0	0
Ethical Funds	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	0
Total	10	7	6	2

DNA description for DNA Graph Export : 01/08/2025 09:53:49		
Junior ISA	Platform/Self Select ISA	
Is this a Junior ISA	Is this a Platform/Self Select ISA.	
1 Not a Junior ISA	1 Not a Platform/Self Select ISA	
5 Junior ISA	5 Platform/Self Select ISA	
Flexible ISA	Online Applications	
ISA offers Stocks & Shares ISA flexibility - allows previously	Do providers accept business for this product online	

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	It is not possible to write new business online for this product 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 1 ETFs not accepted 4 Either UK or non-UK ETFs accepted 5 Both UK and non-UK ETFs accepted	Investment Trusts Investment Trusts available within this product 1 Investment in investment trusts is not accepted 5 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	Auto Portfolio Rebalancing Facility for portfolios to be automatically rebalanced 1 Automated portfolio rebalancing not available 5 Automated portfolio rebalancing available



3 Two income options available	
5 All three income options 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 01 August 2025 00:00

Produced on 01 August 2025

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