

## Modular iPlan: Core Investments

Our Modular iPlan provides a complete retirement wealth planning solution for you and your clients. Start with a pension (SIPP) and our Core Investments range (shown below). Turn other wrappers or investment modules on and off based on your clients' needs (see overleaf). To find out more contact your James Hay Regional Business Development Manager through [www.jameshay.co.uk](http://www.jameshay.co.uk)

### MANAGED PORTFOLIO PANEL

 Clever Adviser INTELLIGENT INVESTING		<h3>JAMES HAY INVESTMENT CENTRE</h3> <p>3,700+ funds Can be used to build your own model portfolios</p>		
				
				
				
			<p>Panel correct as at April 2025. Check <a href="http://www.jameshay.co.uk">www.jameshay.co.uk</a> for the most up to date information.</p>	

### DEPOSIT ACCOUNT PROVIDER



### STOCKBROKERS

(Stocktrade is only available for investments in the Modular iSIPP)



#### PLATFORM CHARGE

First £300k = 0.25% p.a.

£300k to £600k = 0.20% p.a.

£600k to £1m = 0.15% p.a.

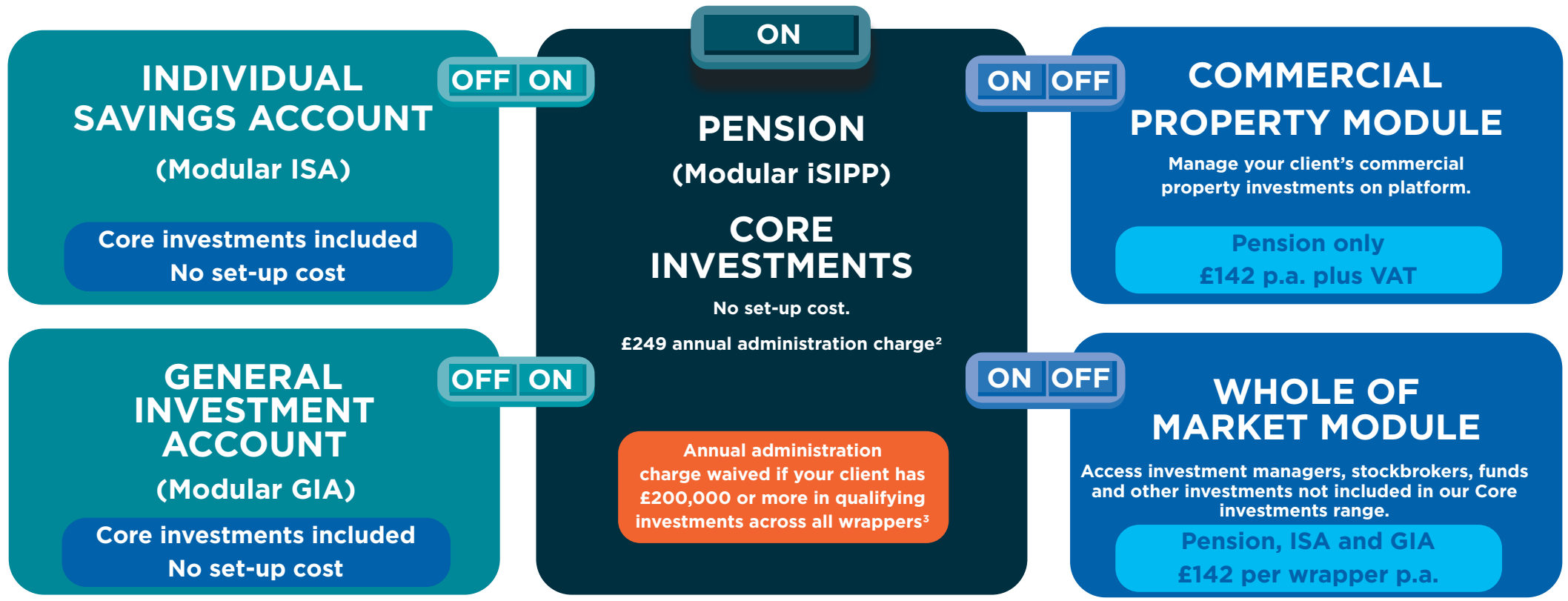
£1m to £1.5m = 0.05% p.a.

Over £1.5m = 0.01% p.a.

The annual administration charge is waived if your client has £200,000 or more in qualifying investments across all wrappers<sup>1</sup>

<sup>1</sup> Qualifying investments include cash in product bank accounts (including bank accounts held in relation to a property), model portfolios from the Managed Portfolio Panel, cash in fixed term deposits and notice accounts from our Cash Panel and investments in the James Hay Investment Centre. For all our charges, please see the product Charges Schedules on our website at [www.jameshay.co.uk](http://www.jameshay.co.uk)

## Modular iPlan: Additional Wrappers and Modules



<sup>2</sup> Additional £28 annual charge applies to panel Stockbroker accounts.

<sup>3</sup> Qualifying investments include cash in product bank accounts (including bank accounts held in relation to a property), model portfolios from the Managed Portfolio Panel, cash in fixed term deposits and notice accounts from our Cash Panel and investments in the James Hay Investment Centre. For all our charges, please read the product Charges Schedules on our website at [www.jameshay.co.uk](http://www.jameshay.co.uk)

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