Full Outsourcing

Full outsourcing means just that. You outsource as much as possible to Platform Securities. This means that you can focus on recruiting and looking after your clients, including making the most appropriate decisions for them.

Using software we supply, you will be able to perform portfolio analysis, modelling and rebalancing, and conduct "What If?" scenarios, before entering your trade instruction into our system. We then take care of everything else.

The Platform Securities full Model B outsourcing service means that we provide all the settlement, reconciliation and administration services you would expect – we can even do the dealing, so you don't have to become a member of the London Stock Exchange to take advantage. As your trades are done in our name, you leverage our balance sheet and Crest membership, significantly reducing your potential overheads.

Our Model B Service Includes:

- We host and supply all system interfaces you will need

- We monitor and manage the full settlement lifecycle, both client-side and market-side

- We handle payments in and payments out, whether by cheque or electronically

- We receive and process all income and distributions

- We create and process all corporate actions, and even provide you with an electronic interface to enable you to make any elections online

- We handle the full client reporting process – contract notes, statements and valuations, Consolidated Tax Certificates, and where relevant Capital Gains Tax reports

- We can create and host a web portal, so your clients can monitor activity taken on their account. We can even provide an online trading facility for your execution-only clients

Importantly, the full Model B outsourcing service does not mean that you lose any control. On the contrary, as we provide you with a front office view directly into our real-time system, you have an immediate view of what is happening. You will also receive regular management information and service level reports.

For more information, please contact us today.