

Standard Life Elevate

A platform to serve your investment needs

While only your financial adviser can recommend which investment platform is right for you, we've designed Standard Life Elevate with a certain kind of client in mind and we'd like to tell you a bit more about that and what you could expect from Elevate.

Elevate is designed for people who:

- are seeking a reliable, competitively priced platform to manage their investments
- want to keep an eye on their investments – it's easy to do through the Elevate app
- want access to a range of investment choices, including open-ended investment companies, unit trusts and exchange traded funds

A one-stop shop

Elevate is designed to support you by providing your adviser with a large range of financial planning, tax and investment management services. It's one of the reasons why Elevate has been awarded a 5 Star Rating from Defaqto, the independent financial information business.

Competitive price

Elevate offers you excellent value for money and is one of the most competitively priced platforms in the market, with simple, transparent pricing and family discounts. You won't be charged if you leave or switch. You can find out more about Elevate charges in the Elevate guide to charges.

Financially stable company

Standard Life Elevate has achieved an "A" Financial Strength Rating from AKG, the independent financial services rating agency, so you have the reassurance that your investments are held by a long established, financially stable company.

Flexible withdrawal options

With Elevate, you get consolidated, tax-efficient regular payments across multiple tax wrappers. Its fully automated pension income options mean you don't need to complete paper forms or provide additional signatures when you want to take income out.

Stay in the market longer and get your money more quickly

Elevate offers comprehensive prefunding, so your money is invested for longer – or can be accessed sooner. We pre-fund switches and tax relief on pension contributions and we don't wait for cheques to clear before placing deals.

Investment choice

Through Elevate, you have access to a wide choice of investments, including a range of leading multi-asset fund solutions and a wide range of discounted funds, as well as managed portfolios. So you and your adviser can find the investment solution that best meets your changing needs and goals.

Service excellence

We invest heavily in the quality of our service and this is reflected in the fact that Elevate has a Gold Service Rating from Defaqto, the independent financial information business. So you can depend on us when you need us most.

In it for the long term

Elevate has been supporting clients for over ten years. We're committed to further enhancing Elevate over the coming months and years, continuing to improve the technology and the processes that help manage your money behind the scenes.

Simplicity and efficiency

Elevate is intuitive and easy to use so your financial planners can provide you with a high-quality service. Whether making new payments, switching your investments or taking withdrawals, instructions are made in real time and carried out with straight-through processing.

Reporting and tools

Elevate's flexible management information tools give your financial planner the information they need to manage your investments efficiently and provide the required regulatory disclosures.

There are a range of tools available, including a capital gains tool, to help your planner manage your tax and there is reporting across all wrappers, so you can get the information you need about costs and charges.

Other considerations

Elevate might not be suitable for you if you need:

- access to a Junior Individual Savings Account (ISA)
- investment capability to manage bespoke or complex solutions

Need more information?

If you need any clarification about any of the information above or if you want to know more about the Elevate platform and what it can offer please speak to your adviser.

Defaqto and AKG ratings are correct as at February 2020.

The value of investments can go down as well as up and may be worth less than originally invested.

Tax treatment can change and depends upon individual circumstances.