


Keeping updated with new bank accounts and constantly changing interest rates is a persistent challenge that most people just don't have the time or appetite for. **We provide a service where one single sign up gives you direct access to hundreds of UK savings accounts with highly competitive interest rates.** You can increase the percentage of your cash that is eligible for protection by the FSCS scheme and boost the return on that cash simultaneously.

 **FSCS  
Protection**

Government-backed FSCS protection of up to £85,000 per individual for each account opened.

 **One-time  
Sign up Process**

Make hundreds of savings accounts available. There are a variety of term options to meet your liquidity requirements.

 **A Managed  
Account**

Ongoing management means always getting better returns for your cash.

## Case Study

Ms F received £900,000 in cash as part of a divorce settlement.

The money was previously held in two instant access accounts of £450,000, each earning an average rate of 0.5%. Ms F felt that she should be earning a higher rate of interest on her cash deposit until she decided what she would like to do with her money. She was also aware that only a portion of her cash savings were protected under the government-backed FSCS protection allowance of £85,000 per institution.

#### THE SOLUTION:

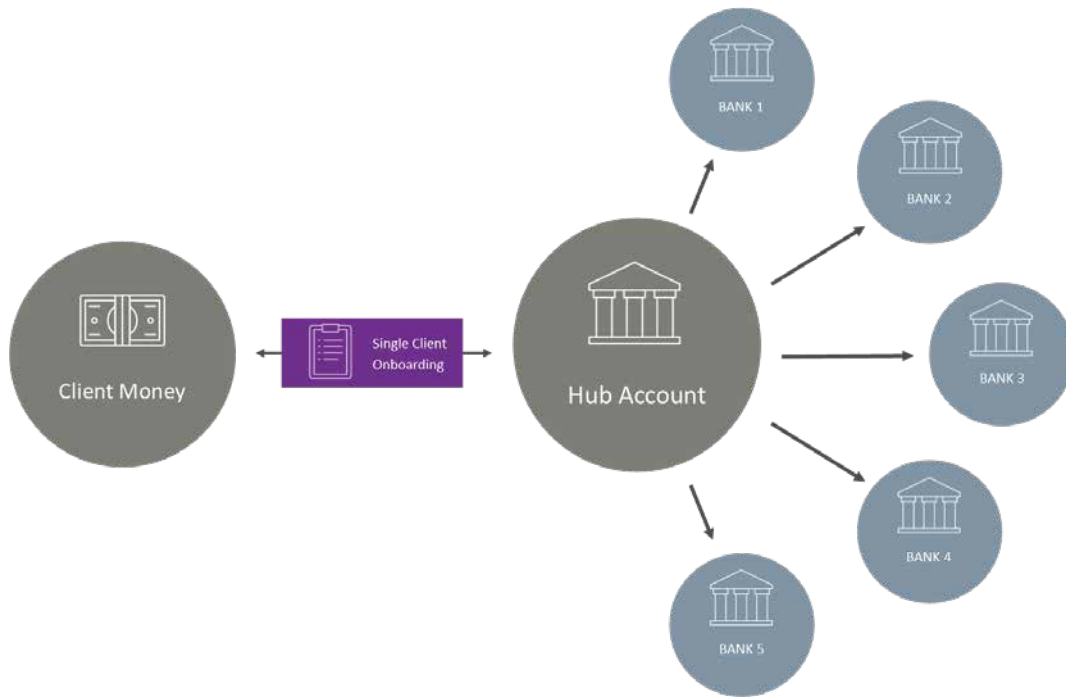
We placed the £900,000 in a selection of five term accounts of between 1 year and 15 months earning an average of 1.5%. The amount of interest earned increased from £4,500 to £13,468, significantly boosting her interest rate income.

#### AS A RESULT, MS F BENEFITED FROM:

- Cash liquidity according to her needs while still benefiting from better interest rates
- Online monitoring in real time on all her accounts
- Rebalance of her accounts once her cash had been moved by a dedicated Account Manager
- Increased FSCS protection for her money



# How it Works



## Next Steps

1

### REQUEST A PORTFOLIO

Contact your PWM adviser and ask for an illustration.  
Alternatively email  
[info@partnerswealthmanagement.co.uk](mailto:info@partnerswealthmanagement.co.uk) or call us  
on 020 3961 5406.

2

### COMPLETE THE SIGN UP PROCESS

Your advisers will provide the forms for the  
initial sign up process. They will also arrange the  
necessary ID checks.

3

### ACCOUNT SET UP AND FUND TRANSFER

An Insignis Account Manager will send you a  
Welcome Letter with details for the platform login.

We'll now need the deposit amount, either by  
bank transfer or cheque.

4

### LOGIN AND START SAVING

You can login to the Insignis platform, view and  
manage your accounts and see your interest grow.

Visit:  
[partnerswealthmanagement.co.uk/depositservice](https://partnerswealthmanagement.co.uk/depositservice)  
to get started.

PWM  
DEPOSIT SERVICE  
Powered by

**Insignis**  
Cash Solutions

020 3961 5406

[info@partnerswealthmanagement.co.uk](mailto:info@partnerswealthmanagement.co.uk)

[partnerswealthmanagement.co.uk/depositservice](https://partnerswealthmanagement.co.uk/depositservice)

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