

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 high 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.

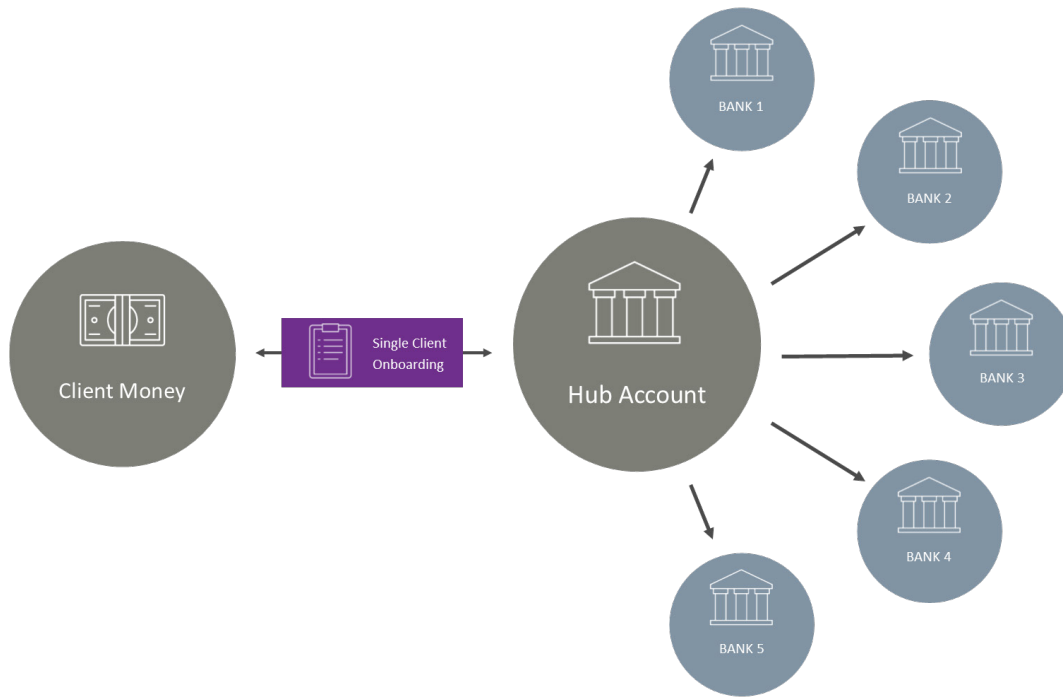
THE SOLUTION:

We placed the £900,000 in a selection of five term accounts of between 1 year and 15 months earning an average of 1.4%. The amount of interest earned increased from £4,500 to £12,600, 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 Relationship 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 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 Relationship 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:

www.partnerswealthmanagement.co.uk/depositservice to get started.

PWM
DEPOSIT SERVICE

Powered by

Insignis
Cash Solutions



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info@partnerswealthmanagement.co.uk

www.partnerswealthmanagement.co.uk/depositservice

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