

Adviser Journey - Investing via Cofunds

Fact Sheet | September 2009

Suffolk Life's new operating model with Cofunds enables advisers to place deals on the Cofunds platform. Registration with Cofunds is a one-off exercise and covers all existing and future plans with Suffolk Life.

The enhanced operating model with Cofunds offers improved dealing and client management features including:

» **improved dealing terms:** collective investments offered via Cofunds are available at creation terms (no initial charge), and switches are free;

- » **enhanced online access:** all transactions are made electronically via the Cofunds website. You can also move cash online between Suffolk Life and Cofunds;
- » **more efficient trading:** a Cofunds Trading Account is available within the SIPP, which enables the efficient trading of available collective investments and includes receipt of dividends, interest and any rebated trail commission; and
- » **single view statement and reporting:** a consolidated view of your client's SIPP details along with any other assets they hold on Cofunds. Management Information; and
- » **commission tracking:** a breakdown of the commission supplied to you by Cofunds.

For information about more benefits of the new operating model with Cofunds please view our website at www.suffolklife.co.uk/cofunds

How do I register and start dealing with Cofunds?

