

Asset Transfer

The Ardan wealth platform is ideal for international clients, trustees and corporate entities who want to hold all of their investments in one secure place.

Rather than trying to track investments across various institutions, each with their own dealing processes, paperwork and charging structures, you and your adviser can transfer your existing investments and manage them all efficiently, securely and cost-effectively on the Ardan wealth platform.

HOW DOES IT WORK?

- 01 Asset transfer instruction received by Ardan International
- 03 Ardan International create the account and contact the counterparty of the existing assets
- 03 Counterparty requirements are met and information is exchanged
- 04 Transfers are instructed by both parties
- 05 Transfers settled with Ardan International and a value is obtained (time frames may vary depending on the assets being transferred)
- 06 Value and shares are added to the account and the asset transfer is complete

BENEFITS

- ✓ RETAIN EXISTING ASSETS
- ✓ FREE BENEFICIARY TRUST
- ✓ NO HIDDEN FEES
- ✓ EASE OF INVESTMENT MANAGEMENT AND REPORTING
- ✓ NO CHARGE FOR ASSET TRANSFERS ON TO THE ARDAN WEALTH PLATFORM

For more information on asset transfers please email ART@ardan-international.com or call +44(0)1624 638800.

* Please note that all assets must be acceptable to Ardan International before the process begins.

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