

# International Wealth Platform Profile

For financial advisers only

This document is intended as a platform summary only and is not designed to encompass all the platform details or terms and conditions.

## Description

Ardan International is an Isle of Man based International Wealth Management Platform and is part of International Financial Group Limited. Ardan International is licensed by the Isle of Man Financial Services Authority.

## Applicants

Available to individuals, companies or trustees. Individual applicants must be at least 18 years old at the application stage. There is no maximum age.

## Minimum investment

There is no minimum investment amount.

## Available assets

Access to 80,000 funds, ETFs, stocks and bonds from around the world in addition to structured notes. Ardan International also provides access to multiple DFM's.

## Investment currencies

Clients can hold any of the following currencies: USD, EUR, GBP, CHF, JPY, SGD, HKD, AUD, AED, CAD, and ZAR.

## Display currency

The platform can be valued in any of the 11 currencies available on the platform.

## FX

An FX can be completed online between any of the 11 currencies available above.

## Client portfolio account

Multiple sub-accounts can be held by each client enabling segregated assets such as QROPs/SIPP, PPB, DFM and direct assets.

## DFM/model portfolios

The platform allows a financial adviser or third party to create and monitor its own model portfolios. There is also the ability to outsource the model portfolio to third party DFM's.

## Charges

Ardan International charges 0.4% p.a. (minimum £200) annual account fee based on portfolio account value.

## Dealing costs - execution only

- Funds 0.25% per trade (min £5, max £25)
- Listed securities (major exchanges<sup>1</sup>) 0.30% per trade (min £25, max £50)
- Other securities<sup>2</sup>: other exchanges, structured notes 0.40% per trade (min £40)

## Dealing costs - model portfolio (minimum 10 clients per model portfolio) and DFM

- £5 per fund transaction
- £25 per Stock/ETF transaction

<sup>1</sup> LSE, NYSE, NASDAQ, Borse/Frankfurt, Euronext, HK, Tokyo.

<sup>2</sup> Any additional third party exchange or security trading costs will be recharged.

## Withdrawals

There are no lock in periods and the client can withdraw at any time. A withdrawal fee of 0.10% (min £5, max £50) will apply to cover administration costs.

## Payment options

TT/bank transfer.

## Trading

Trades can be placed by either a financial adviser, client or an appointed investment manager online.

## Valuations

24/7 online access to client valuations reports.

## Online access

Online access is available to clients, intermediaries, trust companies and an investment adviser. The platform has been optimised for Google Chrome.

## To apply

Please contact [adviser.services@ardan-international.com](mailto:adviser.services@ardan-international.com) for more information.