

Best Platform for Discretionary Managers ENTRY FORM TEMPLATE

Please note, this form will not be accepted as your entry. It is a template that you can use offline while you prepare your entry. When you're ready, you will need to submit your entry online.

Organisation:

Platform name:

Contact Name:

Contact Job Title:

Contact Phone Number:

Contact Email Address:

Please explain in no more than 500 words why you believe your company should win this award. Please focus on the issues you believe are most important in this part of the market and the factors that help to set you apart from the crowd

Questions you might wish to consider include:

1. How do DFMs manage money on your platform?
2. Are there elements of your DFM proposition you would consider unique?
3. What is the percentage of your AUA in DFM portfolios; and the percentage of your AUA in drawdown-specific DFM portfolios?
4. Do you derive any revenue from DFMs in return for their being on your platform?
5. What is the process by which an adviser can move client money from one DFM to another on your platform?
6. Do you offer unconditional access to any DFM (subject to a mutually agreeable bi-party contract) or do you target a specific subset?
7. Please list the DFM firms currently available through your platform

Should you win, please state the official name of the company as you would like it to appear on announcements and on the award:

Please provide your twitter handle:

Please attach your company logo:

ALL ENTRIES MUST BE RECEIVED ONLINE BY 8TH JANUARY 2021