

Lakeside Investment Platform

Powerful and cost-effective, the Lakeside Investment Platform offers excellent benefits for clients. Lakeside Compliance Director and Investment Committee Member, *Nathan Hibbert*, explains how the technology works.

Can you give a brief overview of the Lakeside Investment Platform?

N: Our platform is a bespoke piece of technology that Lakeside Portfolio Services use to trade investments on behalf of clients, such as property and stock market investments and exchange-traded funds.



What are the key benefits of the platform?

N: For us, the main benefit of the platform is that it enables our discretionary fund managers to buy shares quickly and cost-effectively on our clients' behalf. They can also keep checking that they're getting a good deal. Meanwhile, for clients themselves, they can access the platform 24/7 to review statements, check values and see what's happening with their investment.

The platform also offers our clients value for money because we control the costs and manage the investments, as an example, we cap our fees once our clients reach a certain level of investment. In contrast, most other financial companies' fees are percentage based no matter how much you invest, which means that as the investment increases, so do the fees.

How secure is clients' money on the platform?

N: The client's money is safe as it sits in a nominee account separate from the platform. The account is protected by the Financial Conduct Authority rules and the financial strength of the business is subject to regular reporting.

And how often would you advise clients to review their investment on the platform?

N: While it's a great benefit that clients have 24-hour access to the platform, we would advise against checking obsessively as investments can rise and fall daily. Instead, it's better to review the performance of an investment over a more extended period, such as six to 12 months.

You may also be interested in our Finance Q&A on Lakeside Portfolio Services, which can be viewed here.

Please feel free to contact us for further information: *admin@lakesidefs.co.uk*



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25 YEARS SERVING OUR CLIENTS

Lakeside Portfolio Services Ltd. is authorised and regulated by the Financial Conduct Authority whose Financial Services Register number is 838612.