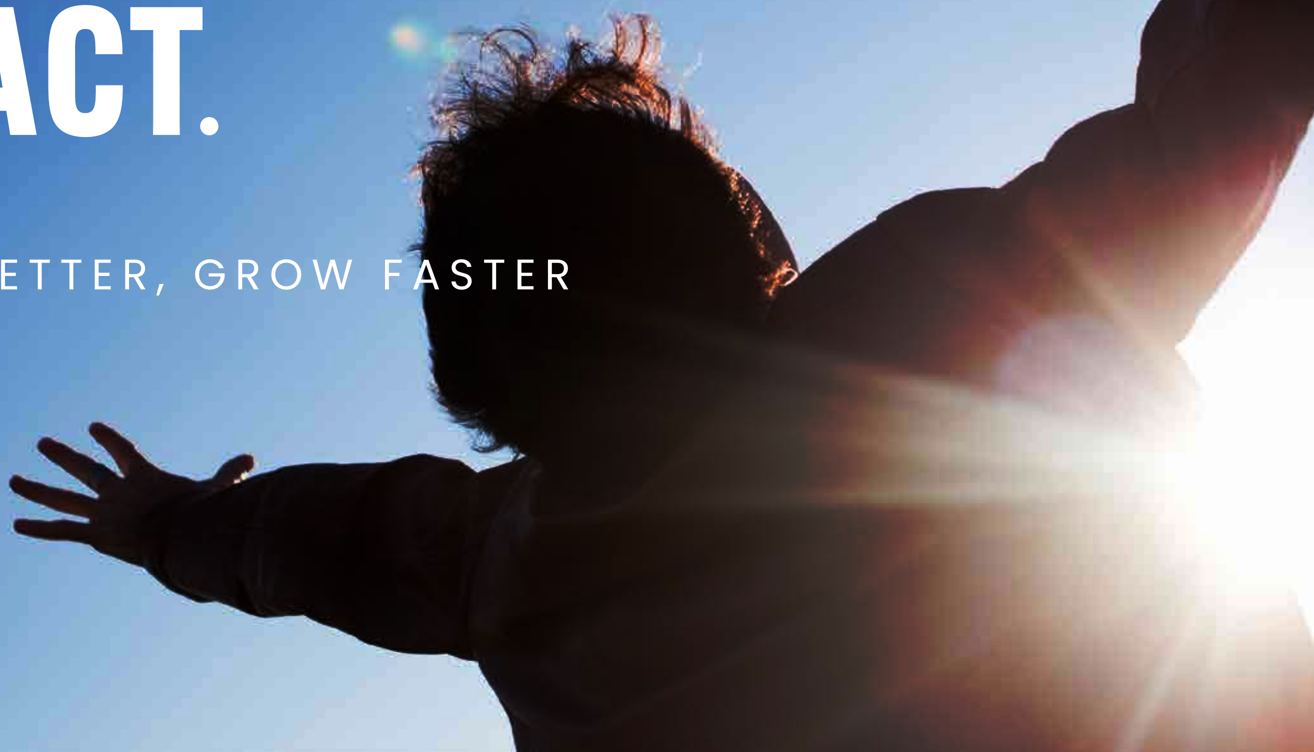
For Financial Advisers Only

timeline
MONEY FOR LIFE

STREAMLINE YOUR ADVICE - AMPLIFY YOUR IMPACT.

WORK SMARTER, SERVE BETTER, GROW FASTER

timeline.co



At Timeline, we deliver a cutting-edge, fully integrated ecosystem for financial advisers.

By combining advanced Planning Software, Evidence-Based Model Portfolios, and innovative Platform Technology for trading and custody, we simplify your processes, save time, reduce costs, and create exceptional outcomes for your clients.

Attractive Pricing

With a DFM fee of just 0.09% and a Platform fee starting at 0.15%, the numbers add up!

5-Star Service

Recognised as 5-Star Discretionary Fund Manager at the FT Adviser Service Awards 2024.

Data-Driven Accuracy

Advanced modelling and projections provide confidence in your advice.

Innovative Tech

Named as having 'The most innovative technology' in a 2024 Adviser poll by Professional Adviser.

Client Engagement

Real-time updates, dynamic visuals, and transparent processes enhance client trust and understanding.

Integrated Efficiency

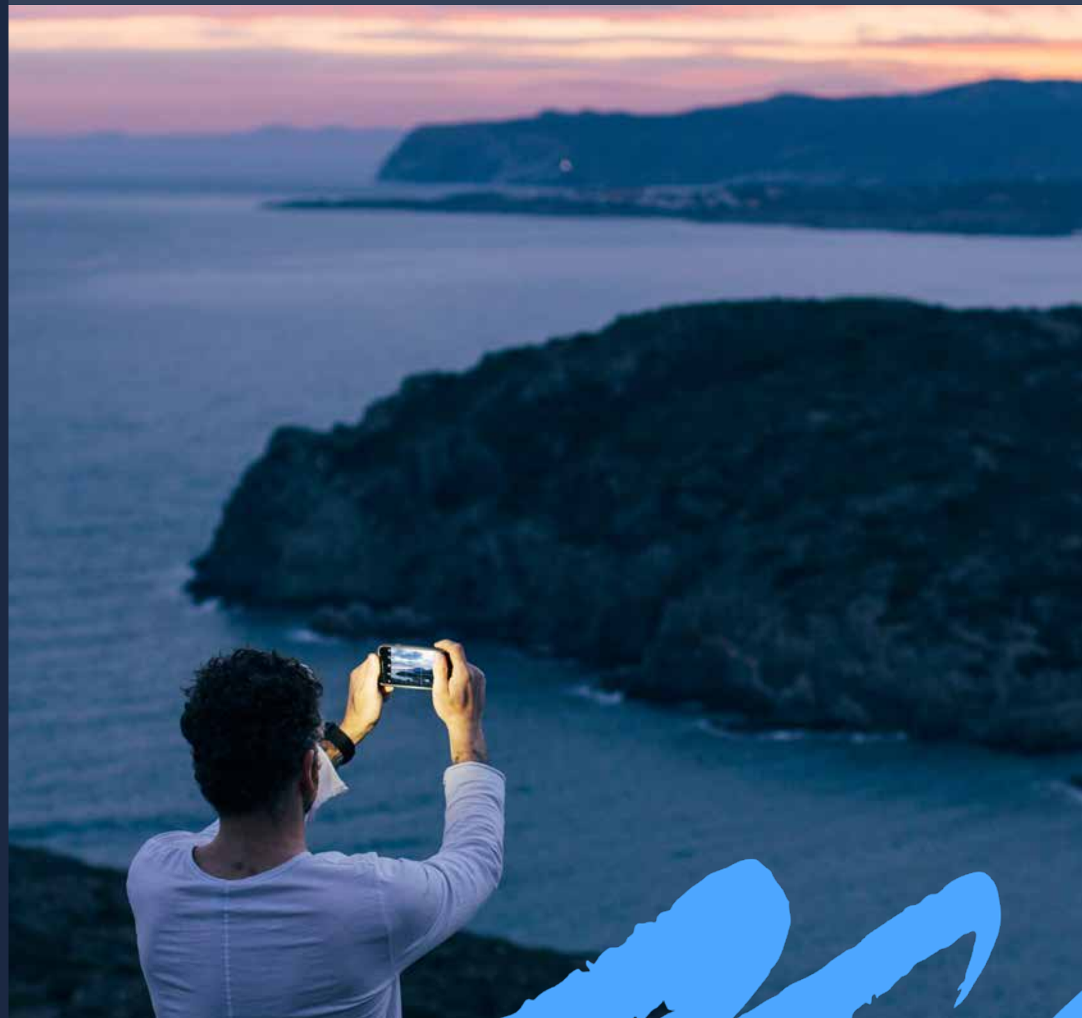
A single solution for planning, portfolios, and platform tech, saves you time and money.

Brilliant

PLANNING SOFTWARE

Turning great advice into seamless client journeys.

Our planning tools are designed to streamline your workflow, enhance client engagement, and ensure compliance with regulatory standards.



TOOLS TO TRANSFORM YOUR PRACTICE

Customisable FactFind

Tailored templates and automated data entry make gathering and updating client information effortless.

Advanced Risk Profiler

Accurately assess risk tolerance and capacity for loss, backed by 120+ years of market data.

Next-Generation Cashflow Modelling

Stress-test financial plans using real-world scenarios, from market volatility to inflation.

Digital LOAs

Reduce your LOA admin by 80% with our fully-automated requests, follow-ups, and tracker.

Compliance & Consumer Duty

Demonstrate suitability and good outcomes while keeping a full audit trail.

Powerful IHT Planner

Show the value of your advice by comparing your tax efficient IHT plan to the default scenario where they will have to pay more tax.

Comprehensive Reporting

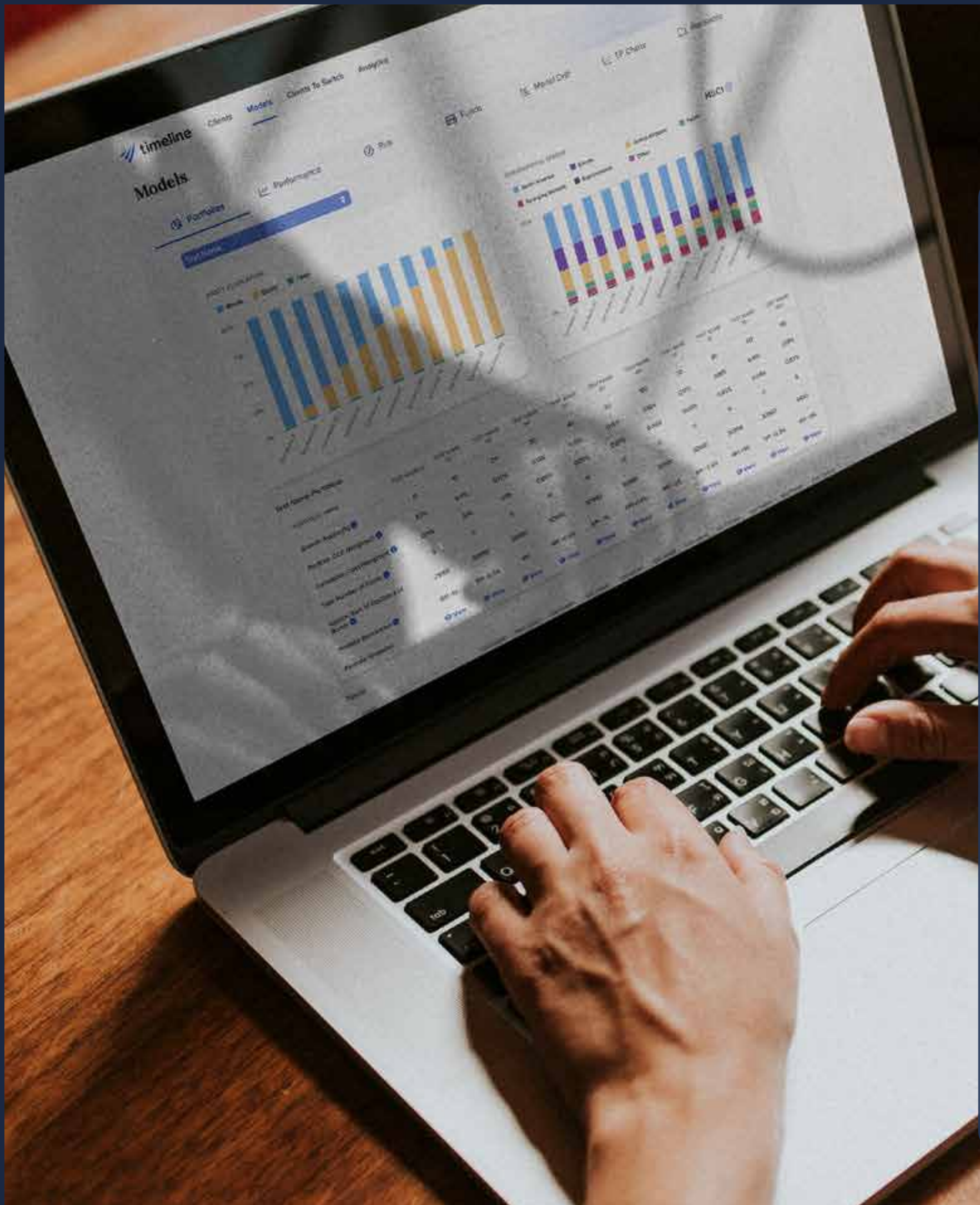
Save up to 60% on review prep time with modular, client-friendly reports that you can customise to suit your needs.

Back Office Integration

Import data from intelliflo and Iress with a few clicks, making setting up cashflow modelling and more easier than ever before.

THE IMPACT YOU'LL SEE

- Great tech that supports the top to tail financial planning process, saving vast amounts of time and money.
- Projections backed by a century of market and longevity data.
- Clear visuals that make complex concepts simple for clients to understand.
- Ongoing updates based on adviser feedback to ensure you always have the best tools at your fingertips.



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I have found Timeline software to be an indispensable tool in my practice.

It offers exceptional capabilities in preparing comprehensive financial plans for my clients, streamlining investment research, and using cutting-edge technology that consistently exceeds the other offerings in the marketplace.

Timeline's intuitive design and market-leading tools have significantly enhanced my ability to deliver clear, client-focused advice while ensuring the highest standards of professionalism and accuracy.

Its innovative features save time and enable me to focus on what truly matters - helping my clients achieve their financial goals.

Robert McFarlane
RJM Financial Management

Evidence-Based

MODEL PORTFOLIOS

Designed for Results.

Where clear comparisons lead to confident strategies, seamless portfolio management and smarter client outcomes.

Our portfolios are rooted in decades of academic research and Nobel Prize-winning expertise, giving your clients the best possible chance of achieving their goals.

CORE STRENGTHS OF OUR PORTFOLIO SOLUTION

Low-Cost, Transparent Pricing

Fees start at just 0.09%, significantly reducing costs for your clients.

Tolerance-Based Rebalancing

Keeps portfolios aligned to their risk rating while optimising performance.

Wide Portfolio Range

Options include Classic, Tracker, ESG Classic, ESG Tracker, and Bespoke, all mapped to major risk-profiling tools.

Bespoke Portfolios

Retain control of your asset allocation while benefiting from our technology and governance.

Tailored Investment Strategies

Deliver portfolios aligned with your clients' risk profiles, aspirations, and regulatory requirements.

Group Investment Committee Meetings

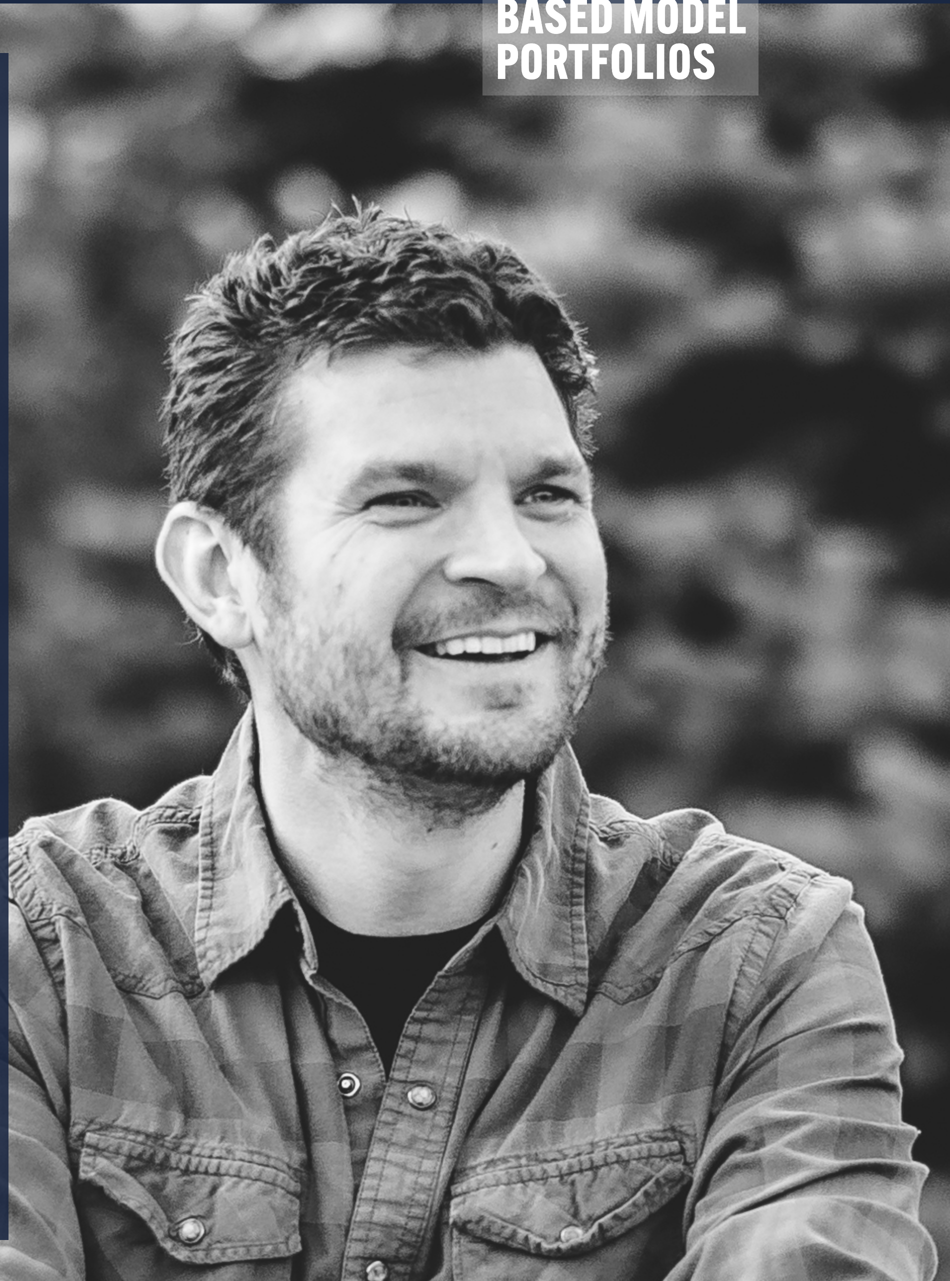
Regular performance, investment management and thematic updates.

WIDELY AVAILABLE ON A RANGE OF PLATFORMS

- 7IM
- aegon
- AJBell
- AVIVA
- Fidelity International
- Fundment
- FusionWealth
- M&G wealth
- nucleus
- Parmenion
- Quilter
- SS&C Hubwise
- Standard Life
- timeline MONEY FOR LIFE
- transact
- true potential wealth management
- wealthtime
- wealthtime classic

THE VALUE WE DELIVER

- **Globally diversified portfolios** optimised for performance and cost.
- **Powerful tech** allows easy management, analysis, comparison and reporting on portfolios.
- **Comprehensive** tax, fee, and cash-buffer management.
- **Access to regular quarterly market commentary,** research papers, and Investment Process Documents.

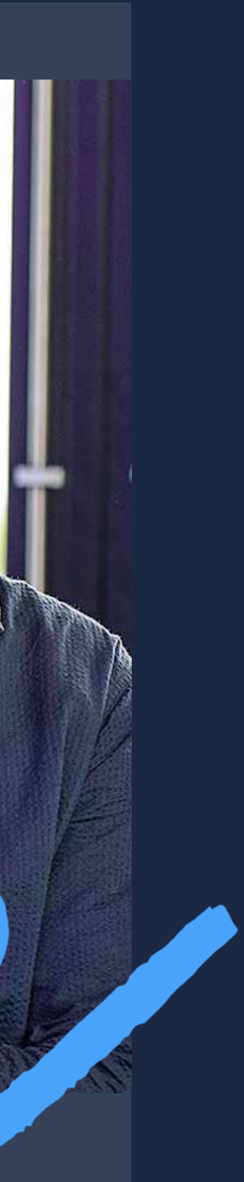


Innovative

PLATFORM TECHNOLOGY

Trading, Custody, and Beyond.

Time-saving features that let you prioritise client relationships.



THE ENGINE BEHIND YOUR SUCCESS

Unified Ecosystem

Manage planning, portfolios, trading and custody with one login, one dashboard, and one client database.

Live Transparency

Track in-specie and cash transfers in real time, with full visibility for both advisers and clients.

Seamless Onboarding

Digital KYC/AML checks and automated Letters of Authority save time and reduce errors.

Client Portal

Bringing together transaction lists, document centre, live asset breakdowns for each account, notifications, secure messaging, and financial plan.

Trading Flexibility

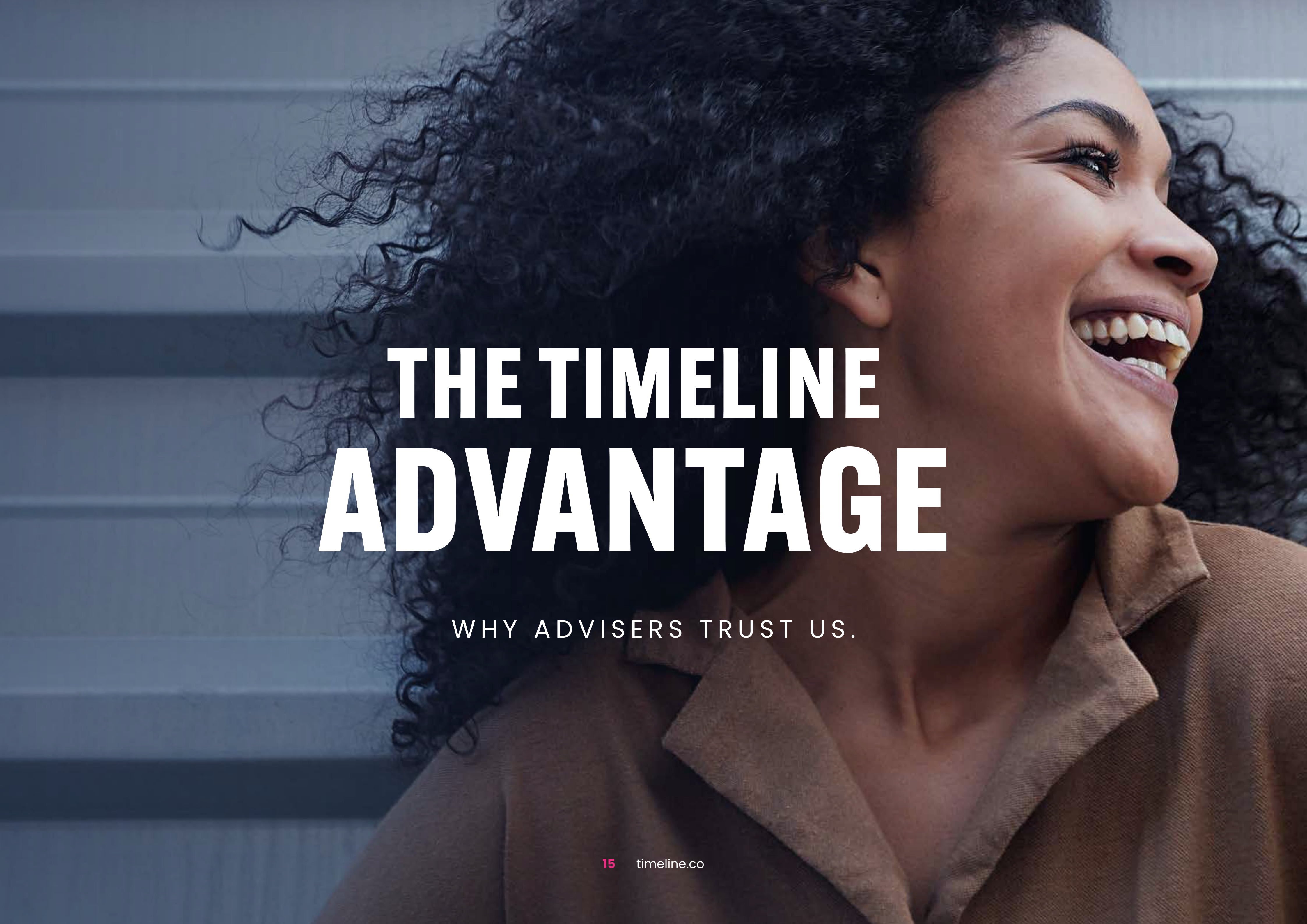
Manage assets across model portfolios, cash holdings, and individual investments with our intelligent approach to investment management.

Range of Tax Wrappers

General Investment Account (GIA), Joint GIA, Individual Savings Account (ISA), Junior Individual Savings Account (JISA), Accumulation SIPP, Drawdown SIPP, Offshore Investment Bonds through Canada Life.

YOUR COMPETITIVE EDGE

1. Standard fees are just 15bps, reduced to 8bps for larger portfolios.
2. Fully customisable family fee management and account-level flexibility.
3. No hidden costs—just straightforward pricing that supports your success.
4. Platform Switch Report to reassure and streamline adoption.



THE TIMELINE ADVANTAGE

WHY ADVISERS TRUST US.

I recommend Timeline's discretionary investment portfolios to my clients due to their focus on low-cost, evidence-based investing.

Their portfolios have delivered consistently strong performance, giving clients confidence in their investments. The support from the Timeline team is excellent — they are responsive, helpful, and easy to work with.

The range of support materials and tools available for both advisers and clients is also very useful, making it easier to explain investment strategies and keep clients informed. Overall, Timeline offers a cost-effective, well-supported solution that delivers reliable results.

Nicola Watts
Jane Smith Financial Planning

Always
HERE TO SUPPORT YOU

We have dedicated Business Development and Adviser Success teams who engage with and support you.

You'll also have direct contact with our team of Investment Analysts who will be in touch with updates regularly throughout the year.

The dedicated Adviser Success Manager and Investment Team will respond to any queries arising.

- Centralised Performance Reporting
- Masterclass events on our products and services
- A full suite of marketing literature
- Investment Process document
- Quarterly commentary
- Regular group Investment Committee meeting
- Annual platform Due Diligence documents
- White label reporting

HOW MUCH DOES TIMELINE COST?

Our pricing is transparent and based on giving you and your clients more. And in most cases, you can be up and running within two weeks of expressing interest.

PLANNING

£135+vat

Per user, per month.
Get a trial for just £1

PORTFOLIOS

0.09%

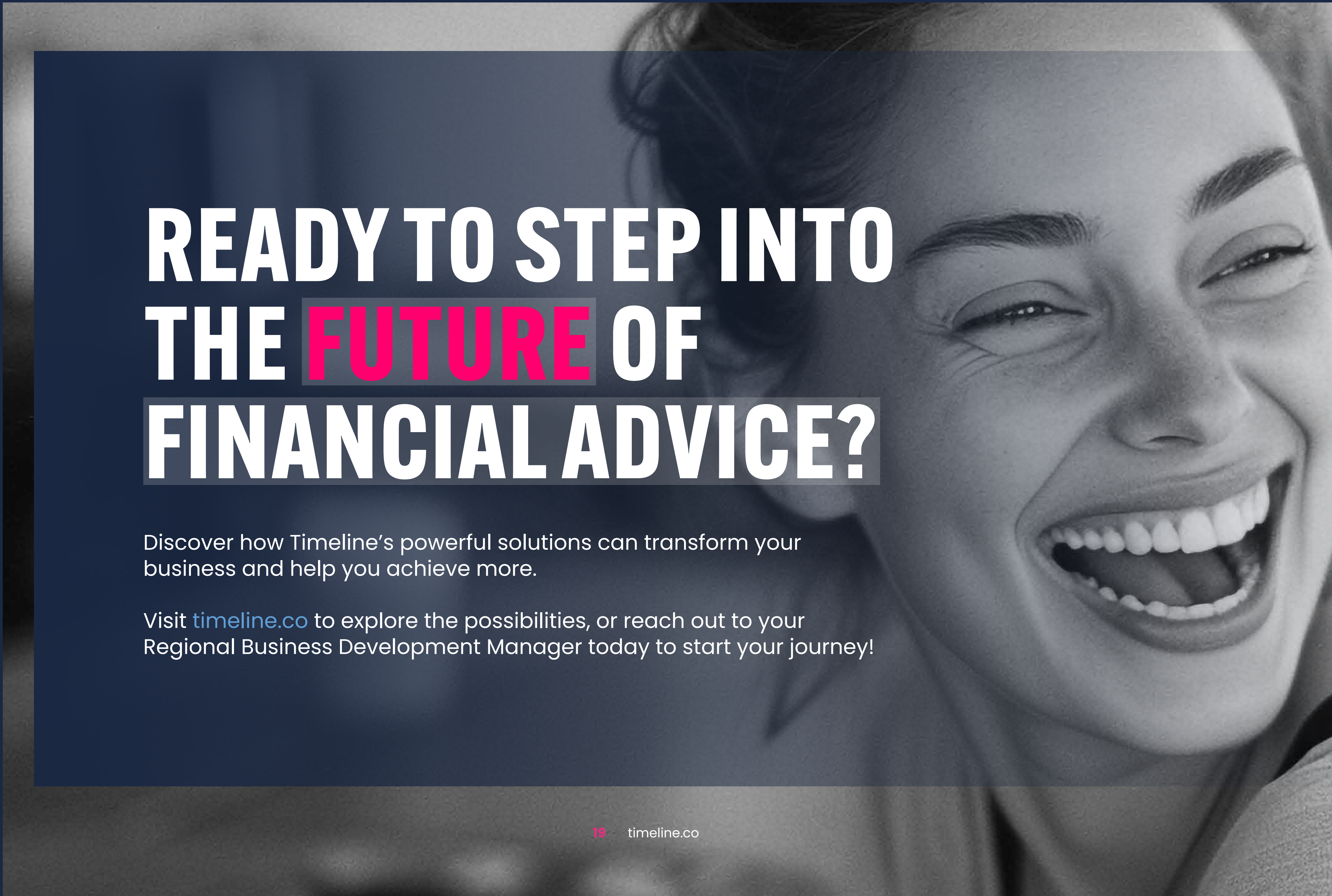
Price per annum.
Minimum requirements apply.

PLATFORM

Less than £1m	More than £1m
15 bps	**8 bps**

Even better...

If you invest at least £20 million of your client funds into Timeline Portfolios, access to Timeline Planning's full suite of tools is included!



READY TO STEP INTO THE FUTURE OF FINANCIAL ADVICE?

Discover how Timeline's powerful solutions can transform your business and help you achieve more.

Visit timeline.co to explore the possibilities, or reach out to your Regional Business Development Manager today to start your journey!

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Investors are warned that past performance is not necessarily a guide to future performance, income is not guaranteed, share prices may go up or down and you may not get back the original capital invested. The value of your investment may also rise or fall due to changes in tax rates and rates of exchange if different to the currency in which you measure your wealth.