

novia  
global

An aerial night view of a city skyline, likely Dubai, featuring a prominent skyscraper (Burj Khalifa) and a canal. The scene is illuminated by city lights and a sunset sky. A green diagonal graphic element is present on the left side of the image.

Global Investment Platform

# Charting your future course

Novia Global Ltd is an international online wealth management platform. We provide market-leading technology, enabling Professional Advisers to invest efficiently on your behalf.

Our vision - **“Intelligent Wealth Management”**

We believe in keeping things simple. The combination of the latest in online platform technology, client security, transparency and a commitment to first class service allows us to offer you both flexibility and choice - enabling the potential for greater efficiencies and returns on your investments.

We only work with Professional Advisers; providing them with the tools and investment technology to create and manage even the most complicated investment portfolios efficiently and easily on our online platform.

We offer access to a range of investment products, allowing you to benefit from the opportunities of investing offshore.

It's possible to invest in our products using a range of currencies. You can also choose to use one, or multiple investment strategies - all within your Novia Global Account.



## Experience you can trust

Novia Global Ltd launched its Wealth Management Service in October 2015 with the goal of bringing the benefits of technology-enabled investing to the international financial market.

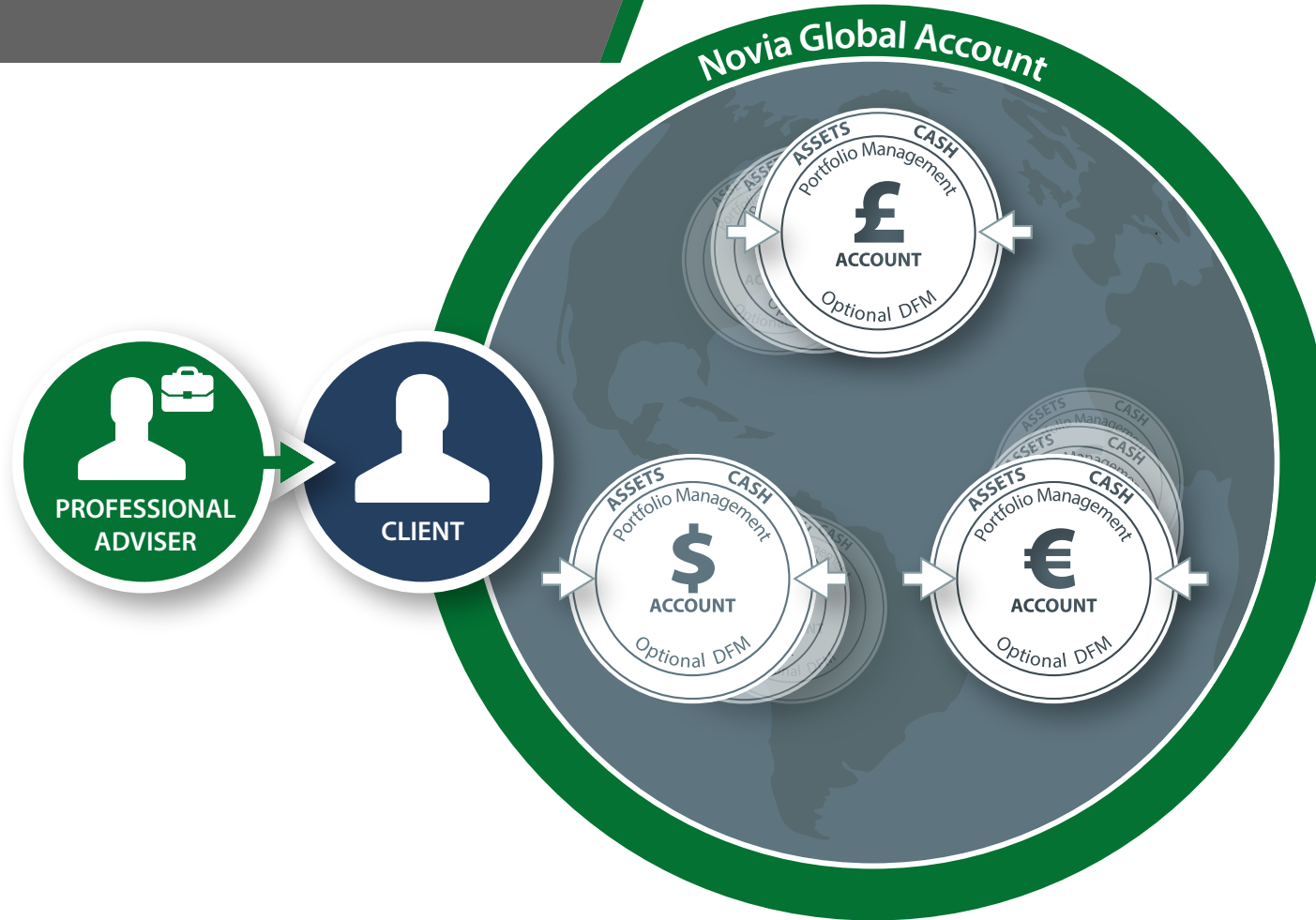
The executive team behind Novia Global is vastly experienced and has already successfully delivered multiple technology-led wealth management platform services.

We are independently owned by private individuals along with small and medium-sized enterprises, each with significant financial services experience who are committed to the longevity and continued success of the business.

// We believe in total openness and transparency, and have one clear aim – the provision of a market leading wealth management service. //



# How we work for you



## Control

Through your Professional Adviser you have complete control over your investments.



## Choice

Select your own assets or choose from a host of market leading Discretionary Fund Managers (DFM).



## Multi-Currency

Facilitate and Report investments in US Dollars, Sterling, Euros, Swiss Franc, Australian Dollars, Hong Kong Dollars and others.

## Protection and peace of mind

The security and protection of your assets on the Novia Global platform is paramount. Some of the key policies we have in place to make certain they remain so are:

- / Pershing (Channel Islands), a subsidiary of the Bank of New York Mellon corporation (BNY Mellon) provide our custodian services.
- / We are authorised and regulated to administer client assets and money by the UK's Financial Conduct Authority (FCA); registration number 653661
- / We operate systems and processes to administer client money and assets that ensure all transactions are carried out in accordance with robust UK FCA regulation
- / We segregate client money under separate nominee names to ensure that ownership always remains with you
- / We provide "Dual Authorisation" functionality to add a further layer of security when placing a trading instruction

We also constantly review and test our processes and procedures to ensure we pursue the best practices in client money and asset protection.



We are always here

Time zones are not an issue. Our secure web portal allows you to track all of the investments you hold in the Novia Global Wealth Management Service at any time of day or night wherever you are!

You'll receive a clear and concise snapshot of the value of your investments including how you're invested and how your investments have performed. You can also view your entire transaction history meaning you will have a fully transparent view of the fees you're paying, and to whom.

The Research Hub also provides a substantial level of clear and concise information covering our comprehensive range of assets.



## Powered for the future

By investing through Novia Global, you and your Professional Advisers will have access to a selection of key functionality and a wide range of asset types. The tax efficient options we provide make it possible for you to maximise your investment potential.

### It's your choice

With a wide range of investments available, you have access to options and investment approaches that cater for every appetite.

We also provide access to a panel of market leading Discretionary Fund Managers who offer expertise across a wide range of investment styles.

### Tax efficient investing

With a number of offshore Products available, your Professional Advisers will work with you to choose the best combination to achieve tax efficient investing. By taking advantage of tax savings over a period of years, it can really make a difference to your financial outcomes.

### Keeping your finger on the pulse

Simply provide your email address to set up access to your own individual secure web portal. Once you activate your access, you will be able to view your investments and key documentation at any time. Your Professional Advisers will also receive a copy of all of your key documentation so that they can provide further information.





## Risks

Novia Global makes available a broad range of different investments. As with any money put into these investment vehicles there are risks. The value of these investments can fall as well as rise and you may get back less than your original investment. Charges taken by Novia Global, the managers of the underlying investment and those by your Professional Advisers will all have an impact on the value of your investment. Charges are made clear from the outset but may change in the future as circumstances may dictate.

Please refer to the Novia Global Key Features document and Terms and Conditions for more information to make sure you understand our services and for any specific risks that may affect you, please speak to your Professional Adviser.

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