The smart investment platform



The Novia Global Platform

For clients and advisers




novia
global

Innovative. Intelligent. International.

Novia Global Ltd is an international online wealth management platform. We provide the technology to enable Professional Advisers to invest efficiently on your behalf.

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 a General Investment Account and a SIPP (a UK registered pension scheme), and an ISA. Each giving you access to a wide range of asset choices.

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.

Our vision - "Intelligent Wealth Management"

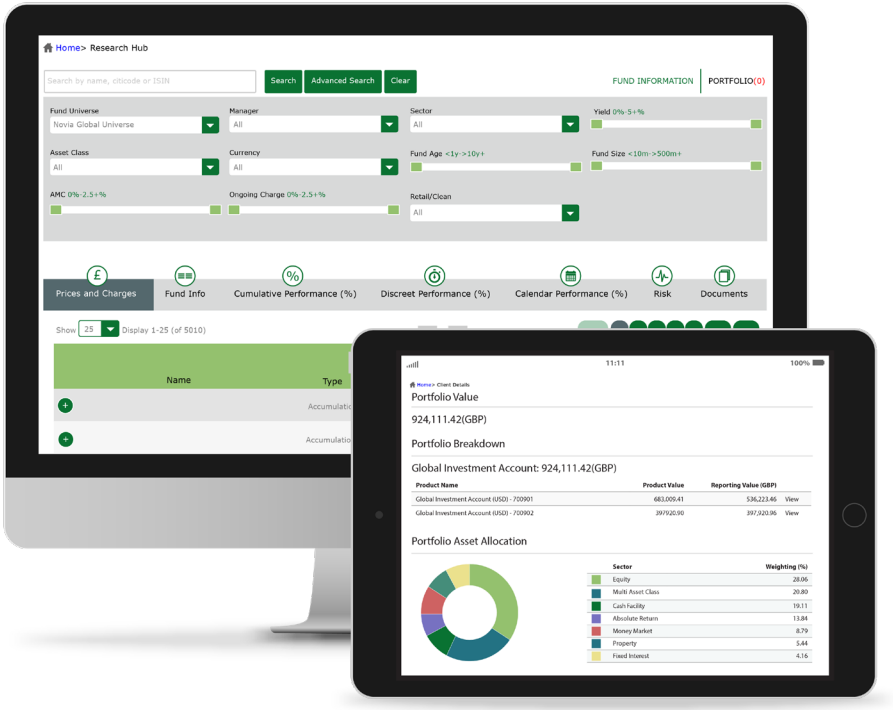


Novia Global Limited is incorporated in England and Wales with company number 09042249. Registered office: 22 St Lawrence St, Southgate, Bath, BA1 1AN.
Novia Global Limited is authorised and regulated by the Financial Conduct Authority. Register Number: 653661.

The Platform

The Novia Global platform was established in 2015.

It was created to meet the investment needs of the internationally mobile client, nationals who have moved abroad and trustees requiring access to greater investment choices.



The platform is a completely online service; it provides a fully transparent, innovative investment solution which has been developed around the provision of reporting, security, and full transparency.

Reporting

We offer comprehensive, fully online reporting & valuation functionality. This includes "real time" valuations, statements and performance reports as well as immediate access to your key documentation.

Security

Ensuring that your assets are managed safely and securely is always at the heart of our proposition.

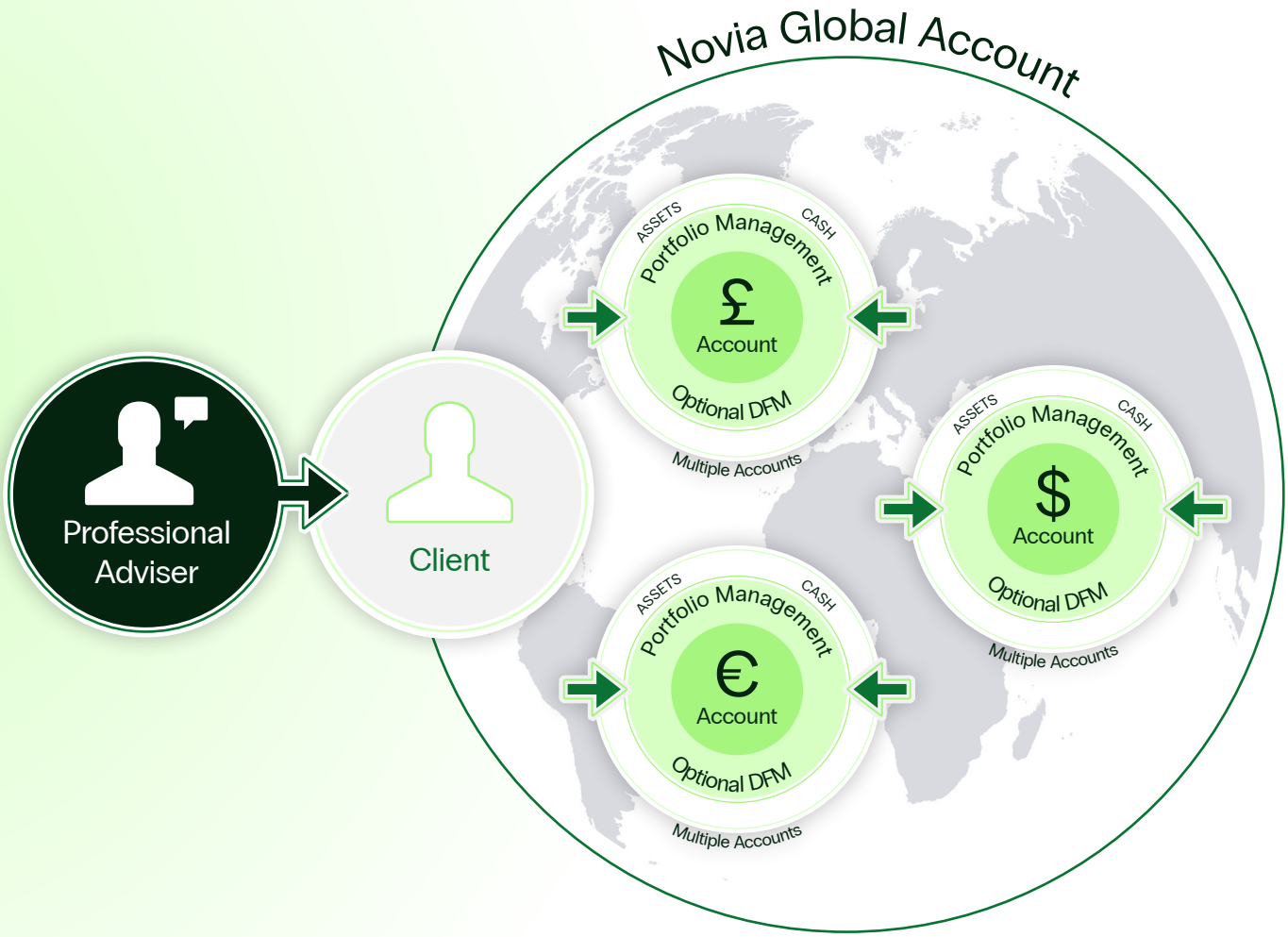
Transparency

Your secure web portal allows you to track all of the investments you hold in your Novia Global Account, including the charges that you have paid.

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

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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, and Hong Kong Dollars

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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 Ireland Limited, a subsidiary of the Bank of New York Mellon corporation (BNY Mellon) provide our custodian services.

We segregate client money under separate nominee names to ensure that ownership always remains with you.

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 are authorised and regulated to administer client assets and money by the UK's Financial Conduct Authority (FCA); registration number 653661.

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.

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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 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.

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Designed around you

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. Whether you prefer a simple or an expansive approach to your investments, we offer access to a large number of fund managers, through which a very broad range of individual funds are available.

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.

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.

Transparent investing

You can work with your adviser to choose the products that best suit your personal circumstances and through our secure web portal, you can view a clear and concise snapshot of the value of your investments at any time of the day.



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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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