For Financial Advisers Only

POWERFUL TECH FOR FINANCIAL ADVISERS

Built to deliver for clients

timeline
MONEY FOR LIFE

POWERFUL TECH FOR FINANCIAL ADVISERS.

BUILT TO DELIVER FOR CLIENTS.

Give your firm the edge with a leading investment, savings and retirement proposition based on our cutting edge tech, data and methodology. It is low cost, easy to use and focused on delivering excellent client outcomes.

INTRODUCING TIMELINE PORTFOLIOS

Your answer to a market leading central investment proposition

Our evidence-based, turnkey model portfolio service empowers financial advisers to deliver a first-class customer experience and excellent client outcomes.

With more time to focus on personalising your advice, whilst we generate reliable returns for your clients, this is the game changing tech your firm needs.

- Simple & low cost
- Driven by empirical evidence
- Powered by technology
- Puts you in control

SIMPLE & LOW COST

We charge a percentage fee for discretionary model portfolio management. The typical cost for the underlying funds held in the portfolios is 0.25%.

This gives clients the best possible chances of meeting their goals, at the lowest possible cost.

POWERED BY TECHNOLOGY

We use technology to cut costs, inefficiencies & anxiety for advisers, while improving long-term investment returns for clients. Our Control Centre is our one-stop digital portal for everything you need to manage your centralised investment proposition.

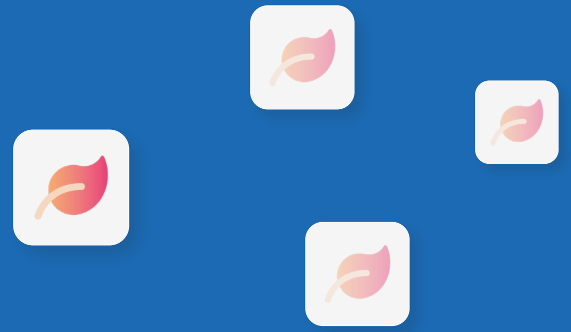
This includes investment process documents, performance data and branded portfolio factsheets.

DRIVEN BY EMPIRICAL EVIDENCE

Our portfolios incorporate decades of empirical data, and take in research from leading economists and investors. It's about capturing market returns, not chasing fads.

PUTS YOU IN CONTROL

With Betafolio, advisers can access a range of services that enable them to focus on delivering core financial planning and behavioural coaching to clients, while delegating time-consuming tasks such as portfolio construction, rebalancing and due diligence to us.



WE'RE NOT JUST BLOWING HOT AIR, THE EVIDENCE IS ALREADY IN

At 9bps, Betafolio secured over £1bn AUM in in Q1 of 2022.

Are you ready to revolutionise your advisory business?

INTRODUCING TIMELINE PLANNING

Financial planning tech that delivers for savings and retirement

Timeline's powerful financial planning tech cuts through time draining tasks – while keeping your costs down – so you're empowered to provide top-class customer service.

And with financial plans that are visually dynamic, easy to understand, compare and contrast at your fingertips, you'll engage, inform and reassure your clients like never before.

POWERFUL BENEFITS

- **Reduced annual review prep time, by as much as 60%.** Timeline swiftly pulls everything you need from multiple sources, to create all kinds of client-friendly reports.
- **Projections your clients can trust.** Underpinned by a century of real market and longevity data.
- **Real-time portfolio monitoring.** Timeline's Livetrack monitors and regularly stress tests the client's plan and saves the reports. Plus, you can set up alerts to stay fully in the loop.
- **Full compliance.** Demonstrate suitability and sustainability at all times with a full digital audit trail.

FACTFIND

Start client relationships the right way with our digital fact finder. Whether done in-person or in a client's own time, it's the best way to establish the full financial picture.

RISKPROFILER

What's your client's attitude to risk? Our questionnaire has no leading questions and takes their investment knowledge into account too.

CASHFLOW

Cashflow modelling to give a fuller picture of income and expenditure.

CAPACITY FOR LOSS

Establish your capacity for loss, compare it to historical scenarios, and advise an essential spending figure.

SUSTAINABLE WITHDRAWAL MODELLING

Demonstrate the impact of asset allocation, rebalancing, glidepaths and fees, and Illustrate longevity risk and show clients the probability of outliving their portfolio.

TAX MODELLING

Demonstrate the impact of a variety of taxes including income, NI, CGT & LTA.

WITHDRAWAL POLICY STATEMENT

Craft a personalised withdrawal policy statement for clients within minutes

TIMELINE PLANNING & PORTFOLIO GIVE YOU EVERYTHING YOU NEED FOR A SHARP COMPETITIVE ADVANTAGE.

With investment, savings and retirement each given the rigorous attention they need, you and your clients can feel fully confident in, and clear on, the plan you put in place.

Plus, if you put £10m+ assets into Betafolio in the first year, we'll include Timeline's cutting edge planning tools in the package.

VISIT **TIMELINE.CO** FOR MORE INFORMATION

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Email: info@timeline.co
Phone: 020 3427 5467
Web: www.timeline.co
Office: 50 Liverpool Street
London
EC2M 7PY

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