

What intermediaries should look for in an investment platform

In this high-performance, competitive industry, what should intermediaries look for in a platform? Francis Marais, Head of Glacier Research and Annalise de Meillon Muller, Manager of Distribution and Sales Support at Glacier by Sanlam, agree on the top critical factors to consider when you're looking for a worthy investment platform partner.

1. **Investment choice.** Ideally the platform should provide access to multiple funds across various investment styles, different asset classes and financial instruments. A platform that offers a wide range of investment solutions is able to serve a broad spectrum of clients with unique investment needs and varying risk appetites.
2. **Ease of doing business.** Ease should be enabled via a range of factors. The technology employed must add real value to your practice and clients and cater for straight-through-processing, increased responsiveness, adaptability and more.
3. **Investment insights.** The humans at the heart of the platform are critical to your success as an intermediary and to ensuring that you have the backing of skill and expertise. The platform needs to be backed by experts who not only have an acute understanding of investing, but also are good at disseminating information and engaging about all things relating to markets and what moves them.
4. **Service.** What is the platform provider's service track record? Are they able to help you and answer your questions or queries effectively as well as efficiently? Do you consider the platform your service provider or business partner? There is a difference. In a recent NMG survey of independent financial advisers (IFAs), most reported that their relationships with their platform and discretionary fund manager (DFM) are the most important relationships after their client relationships.
5. **Access to leaders.** Your platform partner's executive members and other leaders in the business should be as accessible to you as their contact centre agents. Engagement with members of the leadership team is critical in understanding their strategic business philosophy and how this will impact on and help your practice and the relationships that you're building with your clients.

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Glacier Financial Solutions (Pty) Ltd.

A member of the Sanlam Group

Private Bag X5 | Tyger Valley 7536 | Email client.services@glacier.co.za | Tel +27 21 917 9002 / 0860 452 364 | Fax +27 21 947 9210 | Web www.glacier.co.za | Reg No 1999/025360/07

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Private Bag X8 | Tyger Valley 7536 | Tel +27 21 950 2600 | Fax +27 21 950 2126 | Web www.smmi.com | *Reg No 2002/030939/07

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Sanlam Life Insurance Ltd. | Email life@sanlam.co.za | Tel + 27 21 916 5000 / 0860 726 526 | Fax +27 21 947 9440

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