

The Attivo Value: *Explained*

At Attivo, we've adopted a consistent model for our fees. In short, this means that 1% of the assets we manage for you per year pays for the financial planning services you receive from Attivo.

Meet Victoria...

Victoria has invested £250,000 in total under Attivo's advice. With the adoption of the 1% fee model, Victoria's ongoing advice fee per year at 1% is £2,500. Her fee is paid monthly, so £208.33 per month is deducted from her investment to pay for Attivo's services. As the fee is a percentage of the value of your investments, the amount will vary as the value of Victoria's investments rise or fall.



Peace of mind

Adopting a standard fee model ensures that you and all our clients are treated fairly, and that we can provide you with the services, attention and expertise needed to help you achieve your goals. There are no hidden fees or complexities, giving you complete peace of mind on what you're paying, when, and why.



What's included in the 1%?

The standard 1% fee brings you the full benefit of our services and ensures you continue to receive excellent value at every opportunity, including:

Advice from a dedicated Attivo Lifestyle Financial Planner

Our highly qualified and experienced Lifestyle Financial Planners are here to support you on your journey to achieving your financial and personal goals.

This includes planning meetings, cashflow analysis, and support and planning with life events.

The right choice, not the only choice

As an independent firm, we're not tied to any product provider or restricted by parent-company constraints. This means we can provide you with lifestyle financial planning advice that is uniquely tailored to your goals.

Year-round visibility and control

With Attivo's secure client portal, you can see your investment performance and portfolio breakdown, review your documents, and raise queries at any time – not just during your planning meeting.

Ongoing investment oversight and proposition management

Attivo's complete, independent, whole-of-market investment proposition solution means we can advise on the most suitable investment plan for you. Our Financial Planners also constantly review and challenge providers to ensure we can offer you better value.

Access to our Client Services Team

Our friendly Client Services Team is available for ad hoc questions, document support and proactive updates, making it easy for you to manage your financial life with confidence.

The complete Lifestyle Financial Planning toolkit

As part of our all-inclusive service, you can enjoy free access to tools like Podplan (the one-stop online subscription service that helps you and your family get prepared for the future) and the secure client portal.

The Attivo VIP treatment

Receive priority invites to exclusive events and access to our quarterly publication, Attivo Life Magazine.

Any questions?

Please get in touch with our client services team on 01242 585444 or clientservices@attivo.co.uk and they'll be happy to help you.