



KELLANDS

CHARTERED FINANCIAL PLANNERS

Providing sound advice
for over 30 years

0161 929 8838 | www.kelland-hale.co.uk

My Wealth Platform

My Wealth Platform

Welcome to **My Wealth Platform** - **complete** and **instant view** of your **entire financial landscape**.

By combining cutting edge technology with our award winning financial planning service you are totally equipped to personalise and shape your financial future.

My Wealth Platform is accessible 24/7 across all devices so you are never more than a click away from an overview of your financial situation or being able to make a key financial decision, a risk appetite adjustment, live price feeds or directly messaging your adviser.

Our platform is **easy to use** and understand. It has the **highest possible security levels**, secure log-in functionality and cloud-based data **protection**. You can organise your financial future with complete piece of mind.

A view of your financial landscape, **whenever, wherever**.

For more information and to activate your Kelland's Wealth Platform please contact your dedicated adviser or support team on 0161 9298838



My Wealth Platform:



Cutting-Edge
Technology.



Secure.
Uncomplicated,
one-stop view of
all your finances.



View all financial
and non-financial
Investments.



Update/ reduce
your risk appetite
- with real-time
adviser notice.



No need for
multiple logins.

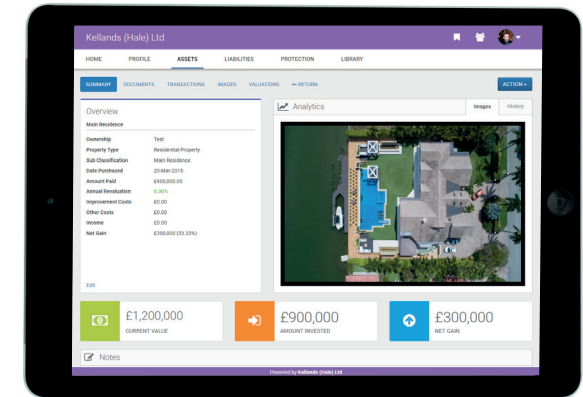
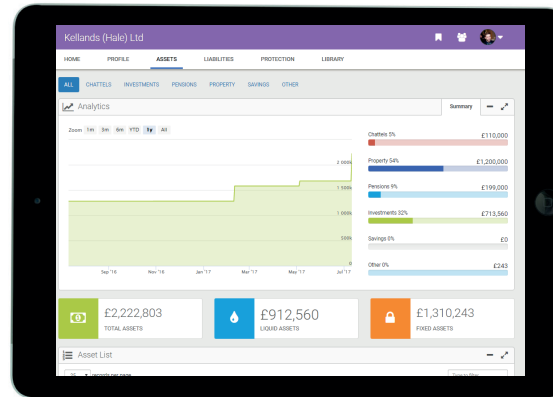
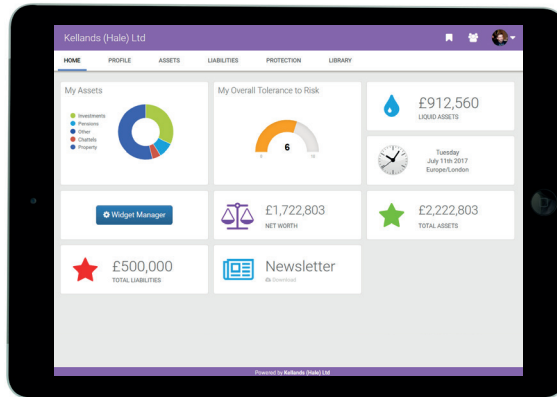


Reduce the heavy
administrative burden
associated and
generated by holding
multiple interests.



Download personal
consolidated tax
statements on
platform assets.

My Wealth Platform



Kellands Special Features

24/7 Portfolio Valuations – Live price feeds on your Kelland's Platform assets.

Unique 'Look-Through' – In-depth information and breakdown about your investments.

Message your adviser – Directly.



Data Protection

We take the security and protection of all personal data very seriously.

Award-winning cloud-based technology.

Fully safe and secure.



Data Storage

Your Fully Personalised Dashboard – giving you ability to store all your important information in one place - Wills, deeds, insurance policies, passport, driving licence.

Safely view all your assets and liabilities: properties, legacy investments, chattels, wines, cars, jewellery.



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