

What we do for wealth management businesses



Gaudi is a wealth management enabler

As a wealth management company, your specialism is providing clients with accumulation investment services via tax wrapper products. Gaudi's specialism is offering flexible white labelled pension products quickly, cost effectively and compliantly, all tailored to your proposition. With your own Self Invested Personal Pension (SIPP) and pension drawdown tax wrapper you can continue to offer clients your wealth management services for their lifetime and possibly down the generations too.

Gaudi provides the technology, administration, technical and compliance expertise and underlying products for a growing number of advisory businesses, stockbrokers, discretionary fund managers, platforms and Fintechs. Gaudi has offered SIPPs, pension drawdown, Individual Savings Accounts (ISAs) and general investment accounts (GIAs) for over 10 years on both an outsource and white label basis. We are assisting our business partners to succeed by currently administering over 25,000 SIPPs and 70,000 ISAs.

Delivering tailored opportunities

Gaudi can create client and adviser interfaces in your brand, to collect client data for you. Or you may prefer to use our active Application Programming Interface (API) to collect the data yourselves and pass it to us. Either way Gaudi will seamlessly receive the data we need to deal with all aspects of pension and investment administration, leaving you to focus on marketing and distribution and delivering your service to clients. As part of a tailored programme Gaudi provides you with:

- client interfaces compliant with HMRC and FCA regulations
- a full range of sample literature and letter templates for the lifecycle of an investment or pension plan
- behind the scenes processing of new business, data updates, transfers, contribution collection (including HMRC tax relief claims) and pension drawdown payments (including PAYE tax deductions), all without the need for paper or wet-signatures
- all required regulatory outputs such as pension wake up packs and annual valuation statements delivered via API back to your customer communication app or portal
- efficient pension or investment transfer processing through the Origo Options system https://www.origo.com/services/OrigoTransferService/All_Customers.aspx
- regulatory reporting direct to relevant authorities to ensure it is all taken care of

Including on trend pension drawdown

The drawdown market offers huge potential. Engaging Gaudi enables you to offer your clients:

- Fully flexible pension drawdown options to:
 - draw as much or as little as they want from their pension plan
 - take benefits in stages
 - take tax-free cash without taking taxable pension income
 - mix and match tax free cash and pension income to maximise tax efficiency
- An online automated application process without the need for wet signatures
- Quick payment of pension cash withdrawals to meet their demands
- All the required pension drawdown documentation including payslips and P60s

We also can offer a range of planning tools that allow your clients to plan their investments and retirement income.

Interested to find out more?

To explore in more detail how Gaudi can help you, please contact Patrick Vaughan, Managing Director on 01722 713910 or 07796 858 884 or at patrick.vaughan@gaudiltd.co.uk

Visit us at www.gaudiltd.co.uk or follow us on Twitter @Gaudilimited or LinkedIn @Gaudiltd

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