

HARTLEY S&S ISA

TAKE CONTROL OF YOUR SAVINGS WITH THE TAX-EFFICIENT HARTLEY STOCKS & SHARES ISA (S&S ISA). SELECT A PLATFORM OF YOUR CHOICE, MAKE VARIOUS INVESTMENTS, AND PLAN FOR THE FUTURE.

TRANSPARENCY ON CHARGES

The charging structure of the Hartley Innovative ISA is transparent. There are no hidden charges.

Hartley S&S ISA	Fees
Establishment Fee	£150 + VAT
Annual Administration Fee	£200 + VAT

The Establishment Fee of £150 + VAT covers your initial application, all your ISA transfers in or cash subscriptions, and your investment administration. The Annual Administration Fee is charged in advance and covers the day-to-day administration of your ISA – including collecting ISA subscriptions, claiming tax relief, providing an annual valuation, and completing all HMRC and FCA reporting to maintain the tax efficiency of your ISA.

NO TRANSFER OUT FEES

We are so confident you will be impressed with our service that we do not charge a fee to transfer out.



MR SMITH INVESTED INTO THE HARTLEY S&S ISA AND CHOSE AN INVESTMENT PLATFORM TO SUIT HIS REQUIREMENTS. A YEAR LATER, THE PLATFORM INCREASED ITS CHARGES AND IT BECAME UNCOMPETITIVE. WHILE OTHER ISA PROVIDERS WOULD HAVE FORCED MR SMITH TO MOVE HIS ISA TO A DIFFERENT PROVIDER IN ORDER TO CHANGE HIS INVESTMENT PLATFORM, THE HARTLEY ISA ALLOWED HIM TO TRANSFER TO A NEW INVESTMENT PLATFORM, WHILE REMAINING WITHIN THE HARTLEY ISA. HARTLEY ALSO COMPLETED THE TRANSFER FOR MR SMITH.

THE PROFESSIONAL, PERSONAL TOUCH

Hartley have provided financial products to clients for over 35 years. We are not a call centre – your calls are answered by a trained financial industry professional. Every client gets their own personal administrator, who holds industry-recognised qualifications. To us, you are not just another customer – we understand that every client has specific requirements. We are here to make the complex world of investments simple.

IMPORTANT INFORMATION

Please read the Key Features Document and the Hartley S&S ISA Terms & Conditions in full prior to applying for the Hartley S&S ISA. These documents and further information can be found on our website.

Hartley are not authorised to give financial advice. We strongly recommend you seek independent financial advice from an FCA-authorised individual and tax advice from a suitably qualified tax adviser so they can tailor recommendations based on your personal circumstances and future requirements.



Hartley Pensions Ltd

5th Floor, 25 Marsh Street, Bristol, BS1 4AQ Authorised and regulated by the Financial Conduct Authority 735936 and registered in England and Wales 09469576 T: 0117 316 9991 E: admin@hartleysas.co.uk W: www.hartleypensions.com