

# FINANCIAL INVESTMENTS



## DRIVE HEALTHY FINANCIAL HABITS ACROSS YOUR BUSINESS WITH SMARTERLY'S SAVINGS AND INVESTMENTS PLATFORM.

### OVERVIEW

Smarterly makes investing easier for everyone. Using their sophisticated technology, your employees can easily invest their money and make valuable savings for the future.

With a range of ISAs available and access to 1,000 funds, your employees can find an investment opportunity to suit their financial situation and personal goals. Capital at risk.

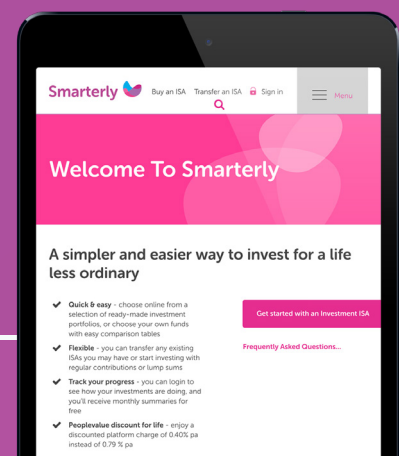
### KEY FEATURES

- Tax-free savings for every type of saver
- Employees can save from as little as £10 per month direct from pay or £100 lump sum
- Easy to use comparison tables show projected returns and total charges so employees get a fully transparent view before they invest
- Employees can build their own investment portfolios, or choose from ready made SmarterMix portfolios which spread their money across a selected range of top-rated funds from impartial comparison tables
- Automated 24/7 monitoring to keep investments on track and free to switch investments
- Employees can transfer money from an existing ISA into a Smarterly ISA
- Employees can access their money at any point in time
- Family members also benefit from discounted platform charge

### HOW IT WORKS

Employees will get their own log in details which they can use to access Smarterly's features via the advantage platform. From there, the process is simple:

- 1 Choose an investment and set a target.
- 2 Check personal details and confirm investment.
- 3 Pay via direct debit or salary deduction (after tax).



For more information please visit: [peoplevalue.co.uk](https://peoplevalue.co.uk)  
Call us: **01865 876696** or email: [enquiries@peoplevalue.co.uk](mailto:enquiries@peoplevalue.co.uk)