

# Service Charter

Select Platform

January 2024

The Select Platform combines cutting edge technology with our partnership approach to working with forward-thinking financial advisers.

That partnership approach is based on the commitments set out here in our service charter.

### **We are focused on partnerships for growth.**

The Select Platform is part of the Marlborough Group, which has successfully grown over more than 30 years by working in partnership with like-minded advisers, helping them prosper and grow by providing first-class service and outcomes for their clients. That client-first ethos and partnership approach are at the very heart of our approach.

### **Our business is clearly focused.**

The Select Platform has a clear focus. We provide a next-generation platform solution for advisers and their clients, and we support this with first-class service. We understand though the importance of the relationship between advisers and their clients. We are clear that our role is to support those relationships without encroaching on them.

### **We are committed to making a difference to your business.**

When you put your trust in the Select Platform, it is about more than choosing market-leading technology. We will work in partnership with you, sharing our wealth of experience and expertise to make a real difference to your business. We will help you meet challenges and seize opportunities in a fast-evolving industry.

### **We will ensure doing business with us is straightforward.**

We understand that your time is precious, so clarity and simplicity are watchwords in our partnership approach with advisers. We work hard to ensure our communications are clear, concise and jargon-free. We have a straightforward charging structure, so you know exactly what to expect, and our service team are committed to answering your questions quickly and efficiently.

### **We will always be clear and open.**

While we are committed to providing a first-class service, we understand that despite our best intentions things may not always go as planned. If that happens, our commitment is that we will always be clear, open, and fair in resolving any issues. With our partnership approach, we are sure you would expect nothing less.

Marlborough Select Platform Limited, whose registered office is Marlborough House, 59 Chorley New Road, Bolton, BL1 4QP and whose principal place of business is 33 Colston Avenue, Bristol, BS1 4UA. Select Platform is the trading name of Marlborough Select Platform Limited.

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