

The Puma Transfer-In Service

The Puma Transfer-In Service offers a streamlined way to bring your clients existing investments under Puma's expert management – with the aim of preserving their investments Business Relief qualifying status. The Service has been designed to provide you and your clients with a simple and, premium transfer experience, while providing dedicated support throughout.



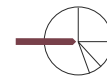
REINVESTMENT RELIEF

We'll reinvest your clients funds into qualifying trades post-allotment, aiming to maintain continuity of their Business Relief eligibility.¹



STREAMLINED EXPERIENCE

Enjoy a simple transfer - we'll support throughout the entire process and can liaise directly with existing providers to keep things moving.



FREQUENT ALLOTMENTS

We offer multiple allotments each week, ensuring prompt reinvestment.



0% INITIAL FEES

We charge no initial or dealing fees when your clients move their investments across to us.



DEDICATED CLIENT SERVICE SUPPORT

Your own dedicated contact will guide you through every step of the process, supporting you with any queries or assistance you require.



PERSONALISED ONBOARDING PACKS

Your clients will receive tailored onboarding packs clearly outlining what to expect and ensuring completing paperwork is as straightforward as possible.



DIRECT PAYMENT OPTIONS

We offer the ability to send funds directly from the investors client account with their existing provider (subject to standard AML and compliance checks).



ADVISER TRAINING AND SUITABILITY SUPPORT

We'll provide advisers with tailored training and hands-on support for product suitability, ensuring a smooth and compliant onboarding experience.



Get in touch

If you have any questions about the Puma Transfer-In Service, please contact our dedicated team on

020 7096 8452 or at

clientonboarding@pumainvestments.co.uk

¹ Tax reliefs are not guaranteed depend on individuals' personal circumstances, minimum holding periods and may be subject to change.