

Protea funds – platform availability

Our Protea funds are available on the following platforms:

Custodian banks	Advisor	Retail
Barclays	7IM	AJ Bell
BNP Paribas	Aegon/ Cofunds	Aviva
Credit Suisse	AJ Bell Investcentre	Bestinvest
HSBC	Allfunds	Interactive Investor
Julius Baer	Alliance Trust	
Lombard Odier	Ascentric	
Pictet	Aviva	
Schroders	Canada Life	
UBS	Embark	
	Fidelity FundsNetwork	
	Hubwise	
	Novia	
	Old Mutual Wealth	
	Parmenion	
	Pershing	
	Praemium	
	Prudential	
	Quilter	
	Raymond James	
	Scottish Widows	
	Standard Life	
	Transact	
	Utmost	

Retail platforms are for investments made by individual investors who are making their own decision to invest (outside of an advisory relationship).

Advisor platforms are for investments made via a professional intermediary (ie: under an advisory relationship).

Please note that Meridiam Investment Management Limited does not assess suitability where the fund units are purchased by investors directly or outside a discretionary agreement. Meridiam Investment Management Limited is authorised and regulated by the Financial Conduct Authority.