

PRUFUND ISA



FUND SOLUTIONS

Prudential UK & Europe is a part of M&G plc, a leading savings and investments business that has been helping customers find innovative solutions to manage and grow their wealth for over 170 years.

In February 2015, Prudential partnered with Link Group to launch a new insured product inside an Individual Savings Account (ISA) wrapper known as Prudential ISA. This connected with the existing multi-asset PruFund already offered by Prudential.

Link Group entered into a long-term partnership with Prudential following the successful launch of the PruFund ISA, seeing significant growth in investors and assets under management (now exceeding £5.2 billion).

During the 2019/2020 financial year, we developed the digital capability for ISA applications to be completed online and automatically submitted to the administration platform with various payment methods available.

This ongoing solution offers enhanced functionality that gives financial advisors greater visibility over their clients' investment with 24/7 access to real-time valuation and transactional information to make investor reviews quicker and easier.

Other benefits include:

- The ability to complete investments, ISA transfers and regular savers on behalf of the investor
- A simpler application process with signatureless processing (particularly important given the global pandemic)
- For most transactions, no need for the investor's signature
- Access to support staff so they can complete reviews or submit transactions

"Link Group is a global, digitally enabled business connecting millions of people with their assets. We worked closely with Prudential to provide a streamlined online ISA that gives financial advisors enhanced visibility over their client's investment. At Link Group, we are committed to our long-term relationships and have a track record of supporting investment managers across all fund structures and asset classes. We look forward to seeing our partnership with Prudential evolve and working together to continue to enhance the digital experience."

Andrew Lelliott, MD of Link Fund Administration

"Throughout our relationship, we have worked closely with the team at Link Group to develop a leading digital proposition that enhances the financial advisor and investor journeys whilst allowing reductions in charges incurred by end investors. Link Group has a focused delivery team and regular check points, giving us confidence that they deliver on their promises. Since we went live in 2020, the Prudential Digital ISA has been a huge success. We are already developing further enhancements delivered on a regular basis to keep this offering up-to-date and continually improve the digital experience. Link Group has repaid our faith in them; a true partnership."

Douglas Law, Product Owner of Prudential ISA at M&G Plc

We focus on client-centricity, deliver on promises made and work in close partnership with Prudential. We continue to deliver an exceptional product and servicing model that supports Prudential's 170-year heritage and importantly set the stage for business growth in the future.

Contact us to find out more about our transfer agency services.