ASSETTRANSFER

Cash isn't the only way to start your investment journey with RL360. Using assets* you already hold to fund an investment into one of our lump sum investment plans may save you time and money.

Speak to your adviser about the benefits of asset transfers to see whether this is right for you.





Asset transfer instruction received with RL360



Our New Business team confirms the plan is ready and then our Asset Transfers team will contact the counterparty



Counterparty requirements are met and information is exchanged



Transfers are instructed by both parties



Transfers settle with RL360 and value is obtained (time frames may vary depending on the assets being transferred)



Value and shares are added to the plan and the asset transfer is complete



RETAIN EXISTING ASSETS



NO HIDDEN FEES



SINGLE TAX-EFFICIENT VEHICLE

Please contact us for more information on asset transfers.

* Please note that all assets must be acceptable to RL360 before this process begins. RL360 Dealing and Custody charges may apply to any assets transferred.

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