Financial Adviser
FAQs

The information provided is current as of September 2023.

1 How can I access your funds for my clients?

Via a Fund Platform. A list of platforms supporting our funds is available **here**.

Via an offshore bond. Our funds are available via a number of offshore bonds. If your chosen provider is not currently listing our funds please contact us and we will arrange for them to be made available.

Directly with EdenTree, via a Stocks & Shares ISA or an Investment Account. An agency will need to be set up when you first submit business.

2 How do I get information about how to access and trade in EdenTree funds for my clients?

Please use our contact form to get in touch with us, available **here**. A local sales representative will then be in touch.

3 How do I access application forms and regulatory documents?

Please visit our literature library **here** or our regulatory information page **here**.

4 How do I find out more information about your funds?

Our website offers a wealth of information, including factsheets, brochures, fund manager biographies and research. Please visit our literature library **here**. Alternatively, please complete our contact form as detailed below and your local representative will be in touch.

5 Who is my local EdenTree representative?

Please use our contact form to get in touch with us, available **here**. A local sales representative will then be in touch.

6 How do I complain on behalf of a client?

Please contact us by telephone on 0800 358 3010 or email **edentreequeries@ntrs.com**. Or in writing to EdenTree Investment Management Limited, Sunderland SR43 4AU.

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7 What commission is available?

As there are no initial charges on our funds, no initial commission is available. Renewal commission continues to be paid on eligible legacy assets.

8 Do you offer an Adviser Fee Service?

No, however platforms do offer this service.

9 General Data Protection

General Data Protection Regulation - use of your personal data.

On 25 May 2018, data protection laws changed. We have updated our practices to ensure compliance with these laws and to ensure that we use your data in a way that is transparent.

Please refer to our Fair Processing Notice or full Privacy Policy for more information.

The purpose of this information is to provide answers to your questions. If you have an Adviser or your investments are administrated by a platform, you should contact them to discuss any matters relating to your investments. This list is not exhaustive, if you have any questions that are not included please contact us on 0800 358 3010.

Our lines are available Monday to Friday from 9am to 5pm.

Contact us:

by calling on 0800 011 3821

by email at clientservice@edentreeim.com

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