

Helping you lead a prosperous life

When you invest, you want to feel confident that your money is in safe hands. Quilter is a leading provider of advice, investments and wealth management, that offers long term security.

We're proud to deliver financial strength and stability for our customers:

- ✓ *Feel comfortable you're investing with a trusted brand*
- Quilter is listed alongside other well-known household names on both the London Stock Exchange, and the Johannesburg stock exchange with a market value of c.£2.3bn*, which places us within the FTSE 250 Index of leading companies.

*As at 31 December 2022.

- ✓ *Hundreds of thousands of customers entrust us with their money*
- We have the means to be there for our customers through the tough times as well as the good. In total, we manage around £99.6bn* assets on their behalf.

Source: <https://www.quilter.com/about-us/quilter-plc/>

*As at 31 December 2022.

- ✓ *With Quilter, you're choosing a company with a far-reaching impact*
- As a large contributor to the economy, our 3,000+ employees actively contribute to the communities in which we operate. We are committed to being a responsible business; one which delivers positive impacts for customers, colleagues, and communities. Our approach to responsible business is outlined in our 'Shared Prosperity Plan', which documents our progress in three key areas of Financial wellbeing, Inclusive growth and Responsible investment.

- ✓ *A professional seal of approval gives our customers peace of mind*
- Fitch is a leading provider of credit ratings which exists to help customers all over the world compare investments against one another, and make better decisions. Fitch's rating* for Quilter is A-, meaning they consider us to have 'high credit quality' and think our ability to pay our financial commitments is strong.

*As at 14 March 2022.

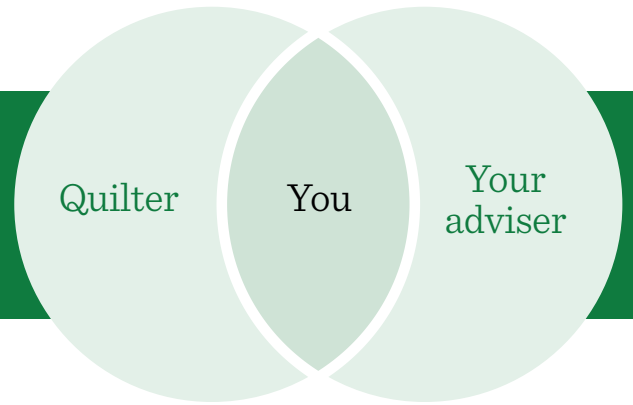
- ✓ *For financial experts, our numbers add up*
- Financial experts look at a company's solvency ratio to assess the strength of its financial resources (cash, debtors and other assets). At year-end 2022, our impressive Group solvency II ratio of 275%* demonstrates our significant financial strength.

*Pro forma, after the return of proceeds from the sale of Quilter International by early June 2022.

Further detail can be found on www.quilter.com under 'Investor Relations'.

Focused on you

We believe that your financial interests are best-served through a trusted relationship with a financial adviser. We work with them to achieve the right outcome for you, giving you both choice and flexibility in how to access our solutions and services.



Our promise to our customers

- ▶ We will always aim to take the time you need to help solve your query
- ▶ We will always aim to communicate with you in a simple and straightforward way
- ▶ We will always aim to deliver a first-class service for you and your family
- ▶ We will use our collective expertise to solve all your queries, no matter how big or small.

Quilter
Foundation



Thriving together

We believe a company's value goes beyond making a profit. This means helping our customers, colleagues and communities thrive and prosper.

Our charity, the Quilter Foundation, supports the many thousands of young people in our communities who face a multitude of challenges. Its mission is to help young people overcome barriers to prosperity. By providing funding and skills to charitable organisations, our aim is to empower young people to fulfil their potential, thrive and prosper.

A breadth of experience

Quilter is a business that puts good customer outcomes at its heart and offers a range of services covering advice, investments and wealth management.

Find out more about all the Quilter group companies at www.quilter.com



Quilter Financial Planning

Quilter Financial Planning was established in 2006 and is one of the UK's largest and most respected distributors of financial advice, with around 3,000 advisers looking after the interests of customers nationwide.



Focused on you

Advisers within our network are focused on providing the right advice and solutions for their clients; both individuals and businesses.

Around 3,000 advisers nationwide

Around 3,000 advisers choose to be part of Quilter Financial Planning as we provide them with the specialist support they need to deliver the highest quality advice for their clients.

Advice for each stage of your financial journey

Quilter Financial Planning advisers operate across all markets, from wealth management and retirement planning advice through to dealing with mortgages and protection needs.

A growing network

Quilter Financial Planning continues to grow its group and also includes Positive Solutions.

Investing in advice

The financial strength of Quilter, combined with Quilter Financial Planning's ongoing success, allows us to consistently invest in our business and the advisers we support. Each adviser strives to continuously improve their professionalism through ongoing personal development.

Delivering real value for money

Quilter Financial Planning uses its buying power to drive down the costs of its chosen providers.

This means you get value for money. We also negotiate exclusive products and features that you will not find anywhere else.



We would like to take this opportunity to thank you for trusting us with your financial future.

If you have any questions please don't hesitate to speak to your financial adviser.

Your investment may fall or rise in value and you may not get back what you put in.

Important points to note

This document is issued to provide information about the financial strength of Quilter plc. It is not intended to provide a comprehensive assessment of all of the factors that may be relevant in assessing a financial services provider.

The results and ratings of one business entity may not influence the standing of other entities within the group. Please also note that Quilter and its underlying businesses do not have any legal recourse to the assets of Quilter plc and Quilter plc does not have any legal obligation to continue to invest in those businesses.

All opinions and facts stated in this document are subject to change, following the date of this document, and there is no obligation for us to update you later on if they change.

For full details on our financial results, please visit www.quilter.com

Approver Quilter Wealth Limited & Quilter Mortgage Planning Limited. 26 May 2023

PDF/220-0798/May 2023

