The AIC: How to vote your shares

The table below provides more information about how to vote your investment company shares on major platforms (for advised platforms, please visit the AIC's financial advisers centre: https://www.theaic.co.uk/financial-advisers/shareholder-voting-adviser-platforms).

	Can I vote my shares?	Is there a cost?	What do I have to do?	What information do I need to provide?	What if I have different accounts with the same platform? (ISA, SIPP, etc.)	How much notice do I need to give the platform?	Further information provided by the platform
AJ Bell Youinvest	Yes	No	For resolutions that could have a significant effect on a customer's shareholding (i.e. EGMs, special resolutions at AGMs or corporate actions such as M&A proposals) AJ Bell alerts customers via their account and enables them to vote online. For standard AGM resolutions that are unlikely to have a material effect on the customer's shareholding (i.e. director re-elections etc), customers can request to attend the meeting in order to vote or vote by proxy and AJ Bell will process this for them.	Enabled online so customers can self-serve.	Customers do not need to notify for each account.	As much notice as possible but at least 5 days.	FAQ - How do I attend and/or vote at an AGM or EGM? (https://www.ajbell.co.uk/faq/can-i-vote-agm-or-egm)
Barclays Smart Investor	Yes, you can vote either by proxy or in person at the AGM / EGM.	No	Customers should call Barclays or start a chat while logged into their account if they would like to vote by proxy or attend the AGM/EGM in person.	You need to confirm how you are voting for each of the resolutions being voted on at the AGM/EGM.	The platform will record your wishes in respect of your full holding provided this is what you confirm. For example, if you have a holding of 1,000 shares split across an ISA and a SIPP and would like to vote in favour of all resolutions, this will be reflected in Barclays' nominee response.	5 working days prior to the meeting for a proxy vote and 7 working days in advance of the meeting if you would like to attend.	Typically on a customer account when there is a corporate action, there is a flag available beside each asset line to alert the customer of a corporate action pending – from there they can follow the link to read more and log their response. See further information:https://www.barclays.co.uk/smart-investor/
BestInvest	Yes	No	Bestinvest can facilitate both voting and attendance at shareholder meetings via its custodian (SEI) on your request either in writing (secure message, email or by post) or by phone. For resolutions on corporate actions that will have an impact on your holding, e.g. M&A or wind-up proposals, Bestinvest will proactively alert you. For standard resolutions, voting by proxy is facilitated upon request. You will need to confirm to Bestinvest whether or not you wish to attend the meeting in person.	You will need to confirm the resolutions you need to work on and how you wish to vote.	Bestinvest will take a single instruction across all of your accounts so that you can vote across your whole holding without having to issue multiple instructions.	6 working days notice is required by BestInvest's custodian. Anything less than this will be on a best endeavours basis.	N/A
Charles Stanley Direct	Yes, shareholders who have a nominee account with the platform can vote their shares. Crest Sponsored Members vote directly with the registrar.	No	You send Charles Stanley a secure message via your online account with your clear instruction and they then handle it from there by submitting the instruction electronically via Crest.	You need to provide the name of the stock along with your clear instructions stating how you wish to vote on all the resolutions.	If you hold shares in more than one account with Charles Stanley, then they require a separate instruction for each. The instruction must clearly state the account number to which it relates.	At least 5 business days prior to the meeting. Otherwise, there may not be sufficient time to get the vote submitted with the registrar.	N/A

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Fidelity Personal Investing	Yes.	No	You need to opt into the shareholders' rights service online. From there, you will receive notifications of meetings for each asset you hold. You can then vote online for all resolutions under discussion in that AGM.	Nothing extra is required once you have opted in.	You can vote for all accounts simultaneously.	Example timings might work as follows - you are notified of a meeting on the 16th of the month, the meeting is scheduled for the 28th of the month, and the vote deadline day is the 22nd of the month.	N/A
Hargreaves Lansdown	Yes	No	Log in to your account with Hargreaves Lansdown. It's not possible to give instructions via the HL app. Select 'View shareholder meetings'. View your shareholder meetings and provide an instruction. You'll be taken to a website managed by a third party called Broadridge to complete your instruction. HL is not responsible for the content on this website.	You need to be clear about how you want to vote.	You need to give instructions for each account you have with Hargreaves Lansdown.	The deadline for each meeting will be displayed above the list of resolutions. For UK stocks, this is generally four working days before the meeting.	Corporate Actions – FAQ: https://www.hl.co.uk/shares/corporate-actions/corporate_action_frequently_asked_questions
HSBC	Yes	No	You can either call the share dealing help desk or send a secure message from your online share dealing account confirming the voting details.	No form to fill in, you just need to tell HSBC what you want to do for each stock. The votes are then bulked and sent to HSBC's custodian.	You need to give instructions for each account you have with HSBC.	As much notice as possible but HSBC deadlines are 2 days prior to the market deadlines to allow it time to collate and submit.	N/A
Interactive Investor	Yes	No	New customers are automatically signed up to the voting and information service, which enables you to receive shareholder materials and vote on decisions directly affecting your UK-registered shareholdings. You will then receive notifications when new documents are available. When you are ready to vote, you log in to your account where the options will be presented in your voting mailbox and you vote according to your preferences.	Nothing at all. Customers are automatically opted in. But if you would like to double check your preferences (for example if you have opted out in the past and would like to sign back up) you can sign in to your secure account and check your voting preferences.	Interactive Investor has opted customers in to voting across all accounts, but to check, you can view your voting preferences in your secure account. But you don't have to worry about account types, it's all done for you.	Broadridge, the platform's voting and information service, sets its own deadlines that a customer has to adhere to in order to get their vote processed. Voting responses are usually required 2 to 3 days prior to the actual vote, to enable collection and submission of votes in good time.	Individual forms are uploaded to customer accounts relating to each individual shareholder vote, explaining what options customers have, how to fill in the details and setting out relevant deadlines. Emails are sent as prompts if the customer has supplied an email address, but the voting forms themselves are added to the voting mailbox section of the customer account.

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