

Address Look Up

Fetchify (Crafty Clicks)

Attitude to Risk Questionnaires

A2Risk

BEIQ - behavioural risk scoring with gamification; includes psychometric, loss aversion and present bias; in development.

Oxford Risk

Bank Account Validation

Experian

Electronic Identification

Smart Search - AML and ID&V

Financial Modelling

Moody's - stochastic modelling engine for accumulation and decumulation and supporting growth rates for Focus' cashflow modeller.

Fund Data

Financial Express - fund data & MIFID II related data

Financial Express - KIIDs, SIDs and Factsheets

FE Analytics

Mortgage Sourcing

Trigold

Quote & Apply

Life & Pensions

Assureweb

Exchange

Platforms

Standard Life Wrap

Remote Collaboration

now:share - within digital & within the secure client portal; includes web chat, co-browsing, voice & video over the Internet, document sharing and conversation transcripts.

Research

Selecta Pension - target Q1 2021

Other

DocuSign - eSignatures

ScheduleOnce - real time appointment booking

VideoSmart - personalised video solutions

Remuneration Feeds

Direct Feeds

AEGON One Retirement	Fidelity	Parmenion
AEGON Retirement Choices	Novia	Praemium
Cofunds		

Easy Link

AEGON	HSBC	Scottish Widows
Ageas Protect (Fortis Life)	Legal & General	St James's Place
AVIVA*	LV= (GE Life/Tomorrow)	Standard Life
BUPA Life Insurance	Old Mutual Wealth (Skandia Life)	SunLife (AXA)
Clerical Medical	Phoenix Life (Abbey Life)	The Hartford
Covea (Sterling Assurance)	Prudential	Vitality Life
Elevate	ReAssure (Windsor Life)	Zurich***
HBOS	Royal London**	

*(Friends Provident / Life and Norwich Union)

** (Bright Grey, Royal Liver, Scottish Life, Scottish Mutual, Scottish Provident and SMA Pegasus)

*** (Allied Dunbar and Eagle star)

Valuation Feeds: Providers

Platforms	Contract Enquiry	Bulk Valuation/s
AEGON One Retirement		✓
AEGON Retirement Choices		✓
Aviva	✓	
Cofunds		✓
Fidelity		✓
Legal & General	✓	
Novia		✓
Old Mutual	✓	
Old Mutual Life Assurance	✓	
Old Mutual Wealth	✓	
Parmenion		✓
Praemium		✓
Prudential	✓	
Royal London (Friends Provident)	✓	
Scottish Widows	✓	
Standard Life	✓	
Transact		✓
Life & Pensions		
AEGON	✓	
Aviva	✓	
Canada Life	✓	
Canada Life International	✓	
Clerical Medical	✓	
Royal London (Friends Life)	✓	

Please note some integrations incur an additional cost.

Contact Us

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