

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

Origo supported platforms

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.

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 /Open Text

AEGON	HSBC	Royal London**
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)
Phoenix Life (Abbey Life)	The Hartford	HBOS
Covea (Sterling Assurance)	Prudential	Vitality Life
Elevate	ReAssure (Windsor Life)	Zurich***

*(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)	✓	
Standard Life	✓	
Transact		✓

Valuation Feeds; Providers (contd)

Life & Pensions

AEGON	✓
Aviva	✓
Canada Life	✓
Canada Life International	✓
Royal London (Friends Life)	✓

Please note some integrations incur an additional cost.