



PENSIONS TECHNOLOGY
PROVIDER OF THE YEAR

2018

Advice Plus
The robo-advice solution



Finalist 2017

Presented by
The London Institute
of Banking & Finance

UK
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FStech
awards 2018
SHORTLISTED

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TOP 10
Policy Administration
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PENSIONSAge
WARDS
2018
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A cloud-based robo-advice solution for life and pension products that provides financial lifestyle recommendations straight through to acquisition.

Advice Plus provides automated advice to consumers at a fraction of the normal delivery cost by establishing the financial needs of the consumer and then providing personalised recommendations.

Advice Plus is aimed at organisations operating within a compliant and regulated environment as it allows for a fully auditable automated robo advice process.

Advice Plus enables providers to rapidly configure the end-to-end digital experience while using its existing back office administration platform. The solution enables digital distribution directly to the consumer or with the assistance of an intermediary. **Advice Plus** supports the complete automated advice value chain from fact find and needs analysis right through to the identification of cover shortfalls and the provision of personalised product and cover recommendations.

Advice Plus was developed in response to the increasing demand from life, pensions and wealth companies for innovative solutions to enable and transform their businesses to meet the challenges of the digital world.

Advice Plus helps organisations to deliver on their digital strategies, rapidly launch new products, provide a modern digital experience and launch new innovative online capability.

Key features of Advice Plus

Robo-advice

full support for online D2C robo-advice across the full life, pension and wealth management sectors

SaaS / cloud-based

24/7 interactive system: robo advice with E-applications and AML checking to allow for Straight Through Processing

D2C

full robo-advice for all products for the life, pension and wealth management sectors with shortfall analysis and recommendations

B2B2C

supports an assisted advice sales process

Online / offline

works identically in an offline mode and online mode

Full data syncing

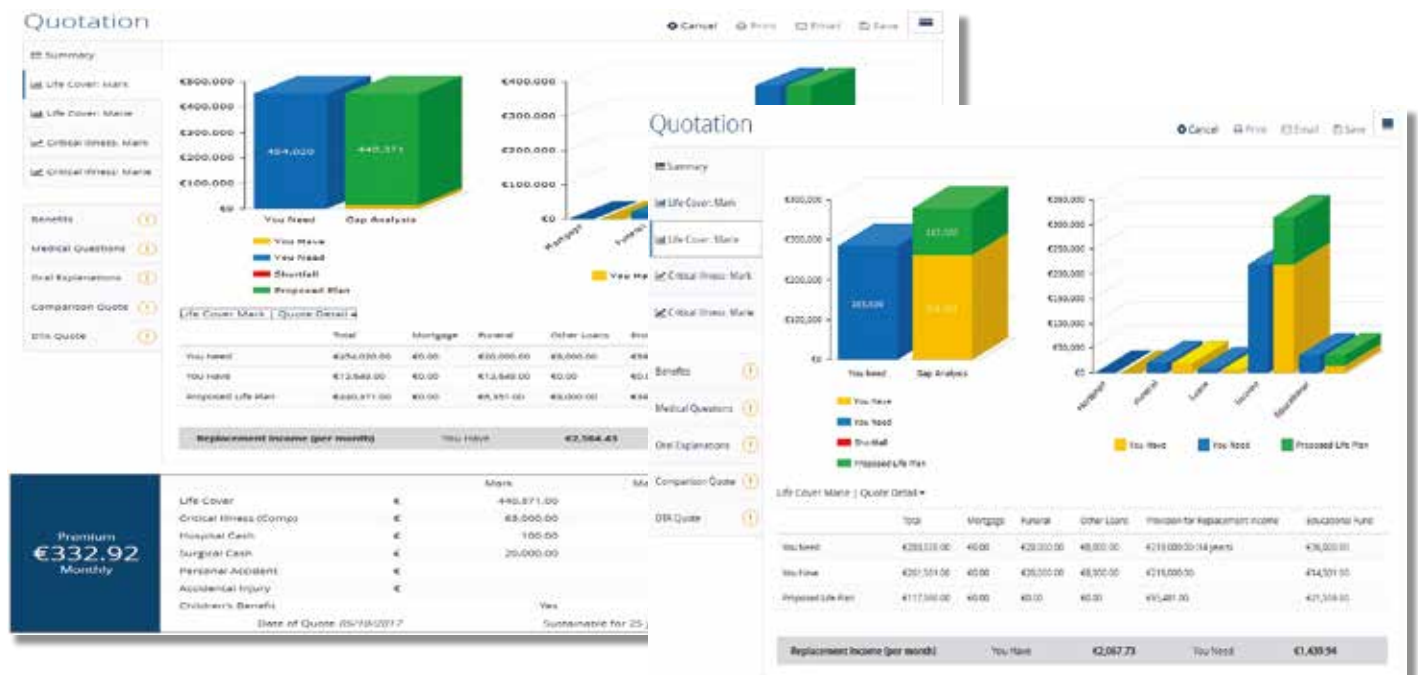
allows for full data syncing from an offline mode to a central database with full matching documentation

Documentation

supports the rendering and sending of all relevant / compliant documentation to the client and head office

Lifestyling

allows for full updating and revisiting of needs and financial commitments for individuals over their life span, giving recommendations based on changing needs



High-level Functionality

