BENEFITS OF THE ADMINISTRATION TRANSFER

May 2019

DO GREAT THINGS EVERY DAY

BENEFITS OF THE ADMINISTRATION TRANSFER

ONLINE EASE OF BUSINESS

Say goodbye to tedious manual processing via application forms and faxing, and welcome to a comprehensive capability of capturing and submitting client and investment details directly into the administration platform within a secure online environment.

A SIMPLIFIED INVESTMENT OFFERING

Your existing investment world provides you and your clients with exposure to multiple products on various platforms with different rules, funds and charging structures. With the introduction of one administrative platform through Old Mutual Wealth, we will bring together the expertise of several capabilities with the added benefit of a simplified fee structure. The following fees will fall away:

- Annuity payment fee
- Administration fee on small value investments
- Exit fee on some funds

This allows you and your clients to benefit from a streamlined investment offering.

A HOLISTIC INVESTMENT ADVICE PLATFORM

Multiple product offerings add to the complexity of advising clients. Old Mutual Wealth's advice-led approach provides a decision-making framework that helps clients to make better-informed decisions on their financial future. This includes assessing where they are now, where they want to be in future and ultimately how they are going to get from one point to the other. Our online investment tools and reports will aid you in the process.

PLANNER PRACTICE EFFICIENCIES

Our aim is to enable the planner to manage the financial needs of all their clients on one investment platform. They can now cater for the true high net worth individuals, and those who have the potential to be future wealth clients, as well as beneficiaries of their existing clients. This allows these clients to experience the benefits of an industry-leading and innovative investment platform.

ONLINE FINANCIAL PLANNING TOOLS & REPORTING FUNCTIONALITY

After the transfer you will have access to a range of online financial planning tools that can be used during your advice engagements with your clients. These **fund tools and calculators,** together with a **variety of online reports** that illustrate your clients' investments against their targeted plans, can assist you in preparing for your client engagements and reviews.

AUTOMATED COMMUNICATION TO YOUR CLIENTS

Streamline and automate communication to your clients via the Communications Engine which allows you to mass email your client base with reports that are relevant to your clients. Add that personal touch to your client relationships by providing your clients with additional commentary that is unique to their investments.

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