

PRESS RELEASE

Build your business on ours

transact

24th May 2021 for immediate release

Transact is awarded 'Digital Process Champion' status from NextWealth

This newly awarded status follows the investment Transact has made to enhance our application processes and reduce the need for paper forms and wet signatures. By providing more digital, time-saving tools, onboarding clients and managing client portfolios has been made even faster and more convenient.

NextWealth reviewed data from 85 platform processes in order to understand the document submission requirements across platforms. They determined that over 90% of Transact's application submissions are supported digitally, making us a Digital Process Champion.

The digital enhancements Transact has made are:

- **Guided Applications:** This feature offers a simpler way sign up investors to a Transact Portfolio – opening portfolios and most wrappers online.
- **DocuSign:** Forms can be signed using this third party digital signature provider.
- **Upload Documents:** This allows advisers to submit documents electronically via Transact Online. This secure and convenient tool is designed to save time and money by removing the need to send original documents to us by post.

This is a part of Transact's ongoing commitment to make business processes easier, more secure and onboarding new clients faster. As owners of our own proprietary technology, we prioritise the changes we make to ensure we continue to be the leader in platform innovation.

Jonathan Gunby, Chief Executive Officer said:

"We are very pleased to receive this award from NextWealth and we are always looking at ways to further enhance our service to meet the needs of advisers and their clients. These latest developments will be of great benefit to both advisers and clients."

For further comment:

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***Notes for editors**

Transact has been chosen by over 6,300 financial advisers and helps them to manage over £46.9 billion on behalf of 201,000 investors (as of 31 March 2021).

Transact has been rated the UK's top platform for 11 consecutive years (2010-2020 inclusive) in both the CoreData Investment Platform Study and the Investment Trends Adviser Technology Report. CoreData and Investment Trends are international market research firms.

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