

Powerful software from Transact

Transact's in house, proprietary software is the beating heart of our platform and sets us apart in the market, where many of our competitors rely on the same third parties to operate their platform. Our secure, reliable software delivers **three key benefits** for advisory businesses:



Continuous improvement

Our large, in-house development team means we are not dependent on a third party to implement change.

We are agile and can make improvements or changes quickly, often in response to feedback from advisers or to meet regulatory change.

Our monthly release cycle, which is informed by feedback from advisers, means we do not disrupt your ability to manage client's investments.

Our team of developers are highly experienced, with an average of 8.8 years' experience working on our platform.

10% of our code base is rewritten every year by our developers, keeping it fresh and up-to-date.



Efficiencies for your business

Over 93% of our processes are available online, reducing administrative overheads and saving time.

Our approach to client consent means we don't require wet signatures to open wrappers, making it quicker for you to onboard clients.

We offer APIs for valuations, transactions, remuneration and account opening that connect with adviser software to reduce data entry.

Our back-office systems are integrated with Calastone, Pay UK, Equisoft and Origo, so wrapper transfers are carried out electronically wherever possible.

Transact's service and support was rated as the top platform by advisers in the Langcat's recent report '*State of the Platform Nation*'.



Peace of mind and reduced risk

As the creators and custodians of our software, we've designed every layer of our platform with security, resilience, and control in mind.

We provide 24/7 monitoring for cyber events and anomalies and monitor the dark web for active or emerging threats.

Our infrastructure is underpinned by resilient, geographically diverse data centres, ensuring high availability and robust disaster recovery.

We carry out automated security scans before every release and client data is continuously backed up and protected against loss or corruption.

We use multi-factor authentication and provide a user framework that empowers advisers to robustly manage access to Transact, within your firm.