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## **TRANSACT'S PARENT COMPANY ACQUIRES TIME4ADVICE**

IntegraFin Holdings plc (IntegraFin), the company which owns Integrated Financial Arrangements Ltd which operates the Transact Platform, is pleased to announce the purchase of Time4Advice, the specialist software provider for financial planning and wealth management firms for an undisclosed sum.

The acquisition will help scale Time4Advice, accelerating software development and allowing it to expand its reach. It will also enable Transact to enhance Platform and adviser back office processes. The two organisations together have a unique combination of technical expertise and detailed understanding of financial planning and wealth management. This collaboration will assist advisers as they continue with their digital transformation.

Time4Advice will remain a separate legal entity and retain its distinct brand. Co-founders Roland Rawicz-Szczerbo and Mitchell Philpott will both remain with the company and there is no direct impact on the roles of staff at either company.

Jonathan Gunby, Chief Executive Officer, Transact commented:

*"Transact has a long history of supporting financial advisers. By working closely with Time4Advice we can help accelerate its growth and provide an enhanced service to advisers through process improvement. Technological integration will not be exclusive to Time4Advice and we already collaborate with a wide range of service providers to the financial planning sector."*

Roland Rawicz-Szczerbo, Founder and Director, Time4Advice commented:

*"Time4Advice remains committed to becoming the UK's leading independent technology provider for financial advice professionals. The investment will enable Time4Advice to accelerate the expansion of its proposition. As a result, Time4Advice clients will see more and improved functionality from CURO sooner."*

### **For further comment:**

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## Notes for editors:

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.

## About Time4Advice

Time4Advice has over 40 staff. It is headquartered in Norwich although its team is spread across the UK and utilises the latest virtual office technologies.

Time4Advice has teamed up with Microsoft to create CURO, the most modern financial advice solution in the market. CURO is an adviser technology eco-system that unifies a firm's entire business including, CRM, advice & servicing, and back-office.

In practical terms, CURO automates manual processes, creates a single-point-of-truth for all data, integrates with relevant third-party systems, and seamlessly unifies everyday business applications such as Office 365.

As a result, CURO enables firms to provide effective multi-channel advice and the ability to service more clients well. It also facilitates access to data, reduces risk and delivers significant operational efficiencies.

Built on Microsoft's Dynamics 365, CURO is underpinned by \$4bn annual investment by Microsoft in the underlying technology, AI and machine learning. This means Time4Advice's clients can be assured that CURO will remain at the forefront of modern advice technology and that it will enable them to take full advantage of future AI and machine learning opportunities.

Increased competition, the cost of compliance, the ability to unlock powerful insights from data, and the COVID pandemic needing to deliver client advice remotely, are all accelerating the need for digital transformation.

CURO has in excess of 4,000 users. However, its addressable market extends to circa 130,000 financial advice and wealth manager users. Plus, an additional 120,000 users in the adjacent market of mortgage advisers.



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