

Transact unveils latest Integration with intelliflo App

Transact is pleased to announce its partnership with intelliflo, designed to reduce rekeying, save advisers time and maintain data integrity across both platforms. This newly developed solution, free to advisers who use Transact and intelliflo, seamlessly transfers client data from intelliflo's practice management system directly into the Transact platform, significantly enhancing the speed and accuracy in preparing illustrations and opening wrappers.

The innovative data transfer application uses a dedicated browser extension that automatically migrates selected data from 'intelliflo office'. By eliminating the duplication of manual data entry when opening an account, this latest development not only improves workflow efficiencies but also maintains data integrity.

Advisers can access the new app called ZeroKey for Platforms is available in the intelliflo store, free of charge, to all intelliflo users.

This strategic integration reinforces Transact's commitment to collaborating with industry-leading technology providers. By fostering a more efficient and cohesive technological ecosystem for advisers, Transact continues to drive innovation in the platform market as the UK's leading platform* with over £65bn of funds under direction. intelliflo, the cloud-based fintech provider, currently supports approximately 2,500 firms and 28,000 users in the UK.

***Rated first for service – 2025 Investment Trends UK Adviser Technology & Business Report.*

Tom Dunbar, CEO of Transact, said:

"We are thrilled to unveil our collaboration with intelliflo to connect their users seamlessly with Transact. Our goal is to extend access to these technological advancements as widely as possible. This development marks a significant milestone in our ongoing efforts to deliver Transact illustrations and applications more efficiently. Ultimately making financial planning easier for advisers and their clients."

Nick Eatock, CEO of intelliflo said:

'We are delighted to have been working with Transact on this initiative. With over half of Transacts assets being advised upon by intelliflo users, who collectively advise on 260,000 individual investment plans, the gains to be made will be significant. Our customers continually tell us that continued improvements in operational efficiency is their number one goal, this collaboration is designed to support that aim.