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Transact teams up with moneyinfo to enhance client document delivery

- New collaboration underscores Transact's commitment to integration and cutting-edge technology for the benefit of adviser firms and their clients
- Automated document delivery simultaneously improves adviser efficiency and client experience

Transact, the UK's leading adviser investment platform, today announces a powerful new integration with fintech provider moneyinfo that streamlines adviser-client communication.

This collaboration is the latest demonstration of Transact's strategy to integrate with leading technology providers to enhance adviser efficiency and client engagement for the over 2,000 adviser firms using the platform.

As part of Transact's vision to continuously improve adviser processes, this latest integration with moneyinfo simplifies a time-consuming administrative task: document delivery.

Through the integrated moneyinfo portal and app, advisers can now automatically deliver key client communication, including valuation reports and statements. Removing this previously manual process will improve the operational efficiency of advisers, providing more time to focus on providing expert advice.

Tom Dunbar, Chief Development Officer at Transact, explained:

"At Transact, our overall strategy is to make financial planning easier, and a key priority in doing this is to improve the technology ecosystem available to our adviser firms. By integrating with client portals like moneyinfo we help advisers operate more efficiently and improve the client experience."

Tessa Lee, MD of moneyinfo, added:

"At moneyinfo, we're passionate about pushing the boundaries of technology to benefit the wealth management industry. Our collaboration with Transact is a direct response to what advisers have been asking for - greater efficiency and peace of mind."

Through simplifying document delivery, this integration allows advisers to focus on their core business, knowing the technology is working behind the scenes to support them."

What this means for adviser firms

For adviser firms, the benefits of this integration go beyond time savings as the automation of documentation also provides a seamless client experience. Advisers now have a choice in how they manage document distribution, with an option to rely on moneyinfo's secure platform to handle everything from encrypted delivery to audit trails.

The ability to automate key processes is a crucial advantage in today's technology landscape and advisers piloting the integration have already seen significant improvements, reporting that the streamlined process saves time but also enhances the client experience.

Chris Riley, MD at Seventy Financial Planning, a firm participating in the pilot, said:

"It has transformed our processes and vastly improved the client experience. We no longer worry about chasing documents - it's taken care of."

Tom Dunbar summed up:

"We're committed to empowering our clients with the tools they need to succeed in a competitive, fast-changing industry and working with like-minded firms like moneyinfo helps us stay ahead of the curve, ensuring our adviser firms benefit from the latest innovations."

Notes:

About Transact

Transact is a leading independent UK investment wrap platform.

Transact's parent company, IntegraFin Holdings plc, is listed on the London Stock Exchange and is a constituent of the FTSE 250 index. Established in 2000, Transact holds over £62 billion of funds under direction on behalf of over 7,900 advisers and 234,000 investor clients (as at June 2024).

About moneyinfo

moneyinfo offers best-in-class financial technology for Financial Planning and Investment Management firms, transforming efficiency and productivity, delivering compliance confidence, and enhancing client experience and engagement.

It believes the real strength of technology is in its ability to help solve human problems and augment human expertise. Whether it's the continuous development of its digital tools, the ability to tailor its offering to meet specific needs, or the dedicated support of its experienced team, it puts the needs of its clients at the heart of everything it does.

moneyinfo gives clients the power to unlock peak performance.



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