

# SCOTTISH WIDOWS PLATFORM

Your home for digital saving and investment planning.



OUR SCOTTISH WIDOWS PLATFORM, NOT ONLY GIVES YOU ACCESS TO STATE OF THE ART FNZ TECHNOLOGY, BUT WE ALSO HAVE OUR OWN USER INTERFACE (UI) WHICH ALLOWS YOU TO SERVICE CLIENTS WITH EASE.

Having our own UI means we can make regular updates to improve your experience when using our platform, driven by your feedback.

Our most recent release brings both new features and improved messaging to our platform. These will be live from the 4th of November. Please find a summary of our latest updates below:



Easier access to transfer updates: over 30 status descriptions have been added, providing a clearer overview at each stage of the transfer for you and your clients. These can be accessed via your client's transaction dashboard.



We have also improved our messaging on small orders. Now, when you place an order that is below the minimum value for investment, a warning message will appear to make you aware that certain investments need your attention before the trade can complete. Minimising errors and delays.



As part of our commitment to vulnerable customers, we have added additional support links to Relay UK within our Login and Getting in Touch pages.

**As part of our continued focus on improving our adviser experience when using the platform, our next release will be coming soon!**


# SCOTTISH WIDOWS PLATFORM

A genuinely **digital platform**. We offer over 50 online automated processes removing the need for most manual intervention.



\* The Scottish Widows Platform is connected for a variety of integrated services with a larger number of the key software suppliers in the market including Intelliflo Office, Iress XPlan Benchmark; Wealthcraft; Dynamic Planner; Adviser Cloud; Moneyinfo; Openwork Concert Hub; Moneyinfo; Fairstone; Contengo and Synaptic Pathways.

**SCOTTISH WIDOWS**

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