

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.

We are pleased to share the recent enhancements to our UI, keep reading to find out more.

On March 16 2024, our latest release brought...



Improvements to new business illustrations that will save you time and effort

- You can now key a transfer expectation which contains both uncrystallised and crystallised benefits in the same illustration.
- Where benefits are uncrystallised, you can specify an amount to be crystallised upon transfer.



Withdrawal journeys that are even easier to manage

- A regular sell to cash and regular withdrawal (from cash) can now be set up at the same time, helping you manage your clients available cash and income needs.



Enhancements to work in progress, helping you keep track of work you've already started

- When you try to process a top-up on an account, where a draft instruction already exists, a pop-up will appear to notify you of this.
- The option to filter by account ID has been added to the work in progress tile.

For more details of these changes and others, please visit our [website](#).

As part of our continued focus on improving your adviser experience when using the platform, our next release is planned for April 2024.


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

 0330 024 2345

 service@scottishwidowsplatform.co.uk

 scottishwidows.co.uk/platform

For use by professional financial advisers only. No other person should rely on, or act on any information in this flyer when making an investment decision. This flyer has not been approved for use with clients.

Scottish Widows Platform is a trading name of Embark Investment Services Limited (EISL), a company incorporated in England and Wales (company number 09955930). Registered office at 100 Cannon Street, London, EC4N 6EU. Embark Investment Services Limited is authorised and regulated by the Financial Conduct Authority (Financial Services Register number 737356).