



# WHERE REAL INNOVATION MEETS REAL EXPERTISE

## Introducing Scottish Widows Platform

It's the pensions and investment platform  
that fits around your business

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# CUSTOM-BUILT TECHNOLOGY BACKED BY EXPERT SUPPORT

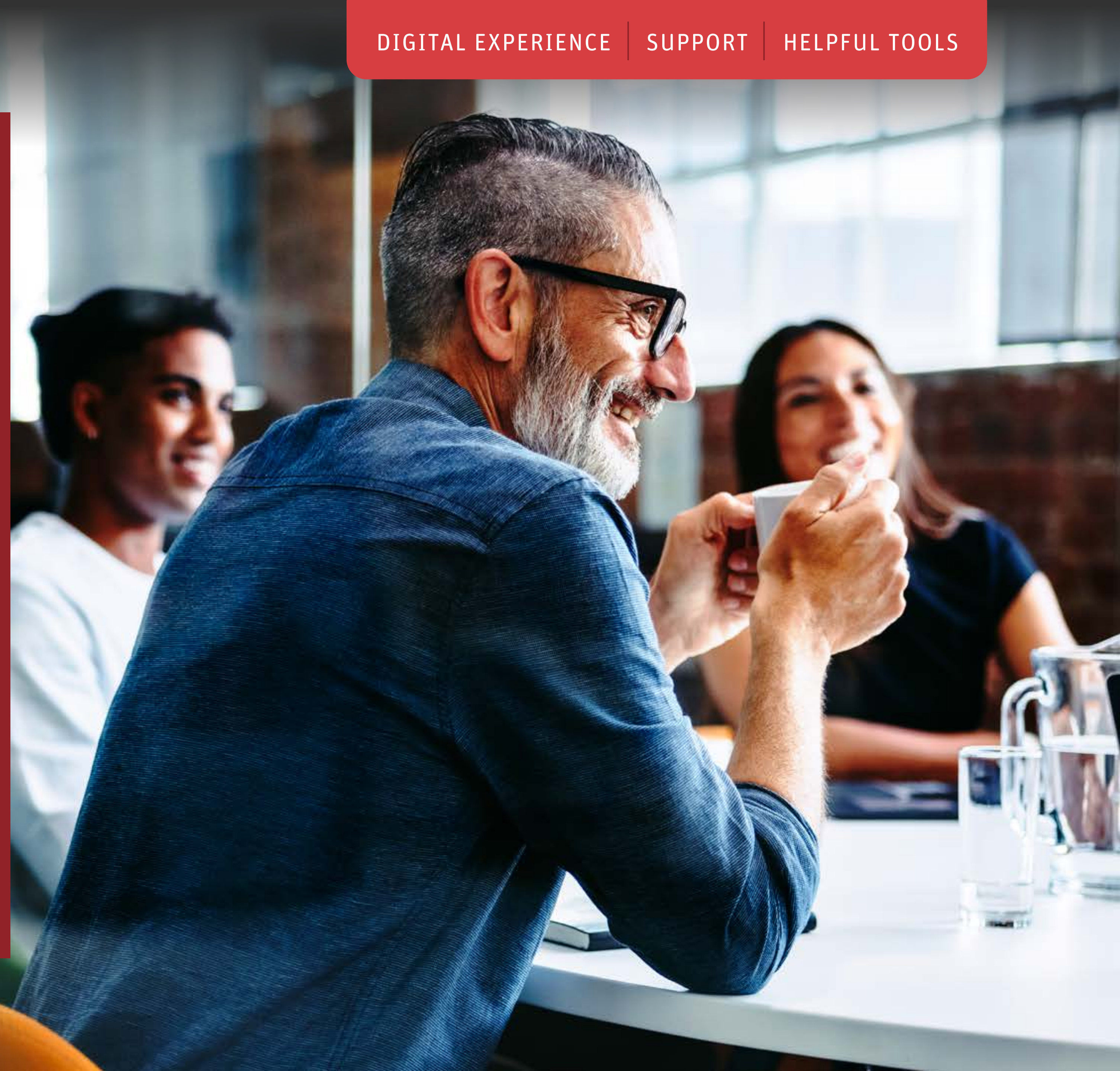
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**Scottish Widows Platform** is the pensions and investment platform that fits around your business.

It uses custom-built technology to give you an innovative, easy-to-use platform to manage your clients' portfolios.

The platform provides access to over a hundred fund managers and thousands of mutual funds, stocks and shares and Exchange Traded Assets. Plus a wide range of tax wrappers, including Personal Pension, ISA and GIA.

One platform. One state of the art digital user interface that we are continually enhancing. Valued adviser insights and feedback help us to deliver improvements that directly align with your needs.



# AN INNOVATIVE DIGITAL EXPERIENCE

At the heart of our platform is custom-built technology, providing a simple, innovative experience to help you unlock new opportunities and support for your clients to achieve their investment and retirement goals.



## A state-of-the-art user interface

Which can be fully integrated with your existing back-office systems for more streamlined workflows.



## An industry standard solution for data integrations

Plus a range of apps and tools to help you manage your clients' investments.



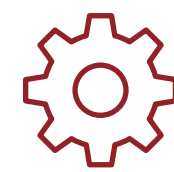
## Easy to navigate

The intuitive system, which uses straight through processing, means you spend less time on administration.



## User interface powered by our in-house team

Allowing us to deliver enhancements to our user interface quickly in response to your feedback.



## Ongoing investment in enhancements

We will continue to invest in our platform to give you a user experience to fit your needs.



## Service and Support

In-built live chat functionality so you can connect to our support teams (available weekdays 8am-5pm).

# DEDICATED SUPPORT FOR YOU

Getting to grips with a new platform isn't always easy. That's why we've built our support around your needs, making it quick and straightforward to on-board and use the Scottish Widows Platform.

## GUIDING YOU TO PLATFORM CONFIDENCE

From the very beginning, our team is on hand to train you on the platform and make the transition onto platform as easy as possible.

**1**

### Setting you up for success

One size doesn't fit all. We get to know your business, your team and how you work, so we can create an onboarding experience and client migration plan that fits around you and your clients' needs.

**2**

### Unlock the platform's full potential

Our platform onboarding consultants will provide both face-to-face and online training and guide you through your first cases, empowering you and your team to use the platform successfully.

**3**

### Hit the ground running

Once you're up and running, your business development manager will work closely with you to understand your specific business goals. Plus, they'll get you access to our technical specialists whenever you need them.

**4**

### Help when you need it

Our servicing teams are here to handle any enquiries, resolve issues and streamline processes for you, ensuring all your needs are met promptly and efficiently. We're available on phone and email, as well as our handy webchat where you can screen share for a quicker resolution.

## TECHNICAL EXPERTISE TO HAND

### Specialist experts

Get peace of mind with insight and guidance from our product and tax focused specialists. Easily available through your business development manager, you can check your understanding, discuss complex cases and get the assurance you need.

### Technical content & CPD

[Access](#) our wide range of articles, webinars and CPD, created by our technical experts on the latest technical changes and key topics.

# CONNECTING YOU TO YOUR EVERYDAY

Give your clients a great experience, by working faster and more efficiently. We aim to streamline processes by connecting our platform to the adviser tools you use every day and your back-office system.



## INTEGRATED TOOLS

Our integrated tools have been created to help you provide an excellent client experience.

### Capital Gains Tax tool

Calculate the realised capital gains and losses that clients have incurred on platform. It can also help you to scenario plan, via our 'What If?' transactional capability. You can also correct incorrect historic book costs with changes held within the platform data.



## BACK OFFICE SYSTEMS

Get real time data to effectively manage client interests. Our platform connects to back-office systems, seamlessly transferring bulk valuation data and transaction history, saving you time.



## THIRD PARTY TOOLS

Adviser tools are integrated directly into the platform. This reduces the need to rekey data, saving time and improving data reliability.

## EVPro

A complete, end-to-end financial planning tool that allows you to build and review your clients' plans, so you can deliver a complete advice journey. Speak to your Business Development Manager about accessing EVPro.

## FE fundinfo

Provides you with access to a whole of market fund range for analysis and reporting, so your clients have accurate and timely fund information. Import Scottish Widows Platform data into the tool for analysis purposes.

## Voyant

Visualise your recommendations and your clients' financial futures with financial modelling software from Voyant. Pull Scottish Widows Platform data into Voyant, reducing the need to rekey and saving time. Requires a Voyant licence.

Find out more about our integrations [here](#).

To find out more about Scottish Widows Platform  
visit our [website](#).

**SCOTTISH WIDOWS**

Taking on the future together

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).

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