

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 latest release focuses on ensuring the information you need is readily available. Please find below a summary of our latest updates available from 22 August:



Viewing Assets under administration at firm level has never been easier. All users will now see this as default within Dashboard. Additionally functionality also added to allow filtering by specific advisers (access permitting).



You can now view trade information (open and completed actions) at a glance via the client dashboard transaction tab. By clicking 'Details' you will see useful information, such as, settlement value, quantity, and status (authorised, placed etc).



You can now view new business journeys submitted by yourself and others. Simply go into client management and click 'Work Submitted' action tile.



Client permission settings now all viewable on one page. Removing the need to click through different products to amend.

As part of our continued focus on improving your adviser experience when using the platform, our next release is planned for October 2023.


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 now live for Bulk Valuations via the Origo Integration Hub with the majority of CRM solutions, including: Benchmark; Wealthcraft; Dynamic Planner; Adviser Cloud; Moneyinfo; and Synaptic Pathways.

SCOTTISH WIDOWS

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