

# VERMEG Advisory Portal

The VERMEG Advisory Portal is designed for UK platforms – both retail investment and workplace pensions. It reduces resources allocated to non-core business tasks and through greater empowerment and engagement, increases satisfaction levels for all types of users.

The Advisory Portal is in production with two of our customers, Scottish Widows and Embark. Both customers have integrated our Advisory Portal with their FNZ system.



We bring easy-to-use digital technology to advisers, individual customers and employers. As an organisation we have significant expertise in life, pension and platform solutions and we have made significant investment into our Advisory Portal user experience (UX). The benefits that this brings are:

## For Advisers

- / Advisers find it easy to use our portal when reviewing their customers portfolios, they are not frustrated or confused by platform technology
- / The Portal will work across devices to enable advisers to work with their customers
- / Simple one-touch interface that can be understood by professionals and customers
- / Real time dashboards enable investment and retirement planning
- / Digital customer onboarding

## For Individual Customers

- / Individual Customers find it easy to understand and navigate when completing self-service tasks and are more engaged with their investments
- / Configurable customer self-service online portal enabling viewing of account balances, fund valuations and e-statements
- / A portfolio library to access and/or upload all appropriate documents

## For Employers

- / Easy bulk upload of new members, leavers and changes for workplace pension schemes
- / Configurable validation on missing data during bulk changes
- / Payroll processing for contributions

The Advisory Portal is a portal for different personas, and they will have different views and access rights.

The innovation investment that we have made into the UX means that you can deploy your UX investment into other projects.

In addition to the easy-to-use UI, the Advisory Portal has a wide range of functionality, which includes:

- / Valuations
- / Fund switch
- / Fund redirections
- / Drawdown illustrations
- / Drawdown initiation



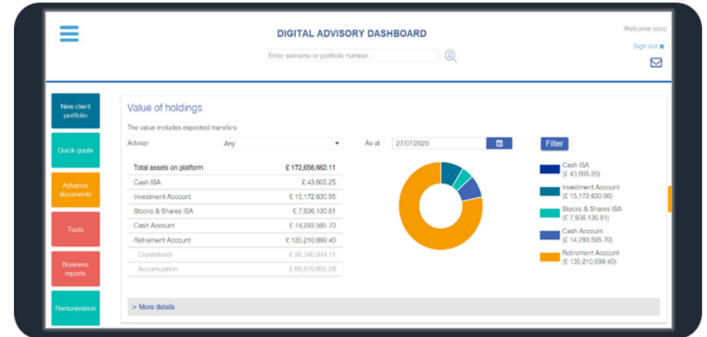
Advisers



Customers



Employers

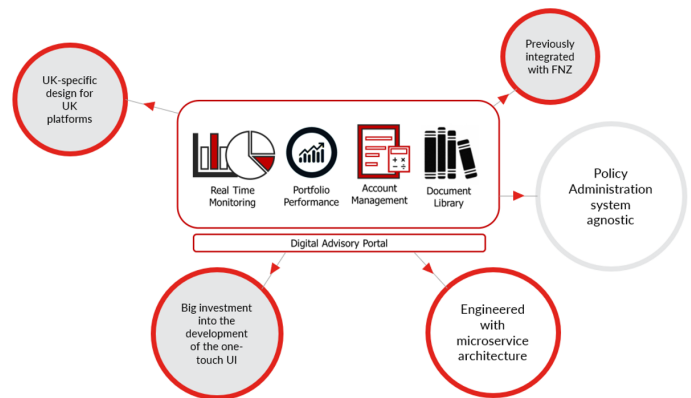


Although the Advisory Portal has previously been integrated with FNZ, it is policy administration system agnostic. Because of the way that it has been engineered with microservice architecture, it can be integrated with any system.

It has a UK specific design, to administer financial products such as:

- / Retirement accounts
- / SIPPS
- / Investment Bonds
- / ISAs
- / Workplace pensions

VERMEG will enable you to combine past and future into the present. We will improve constraints and unleash the value of your existing systems (IT and business lines) through digital transformation.



We are independent in both capital and technology and we have been committed to our customers for over 25 years.

To discuss your company's needs and find out more about how VERMEG's Advisory Portal can help, please contact [communications@vermeg.com](mailto:communications@vermeg.com)