

SelctaPension

Selectapension provides an innovative and comprehensive Pension and Investment planning system, providing highly detailed analyses. The Company is not funded by any Pension Providers and is completely independent and unbiased allowing independent advisers to use the tools impartially to meet their client's needs.

FE

FE, Financial Express: Trusted by the hundreds of thousands of investors, advisers, asset managers and platforms who use FE data, software and investment advice every day, FE is the UK's leading investment ratings and research agency, supporting a variety of investment methods and styles to suit all client's needs. FE cleans, distributes, analyses and reports and provides outsourced investment propositions allowing us to assist our clients with investment decisions, demonstrating regulatory compliance in the investment process providing clear reporting and adding value to the investment proposition. Fe was founded over 20 years ago, and is still run by its founding partners. Within FE, we are able to leverage Fe Analytics, FE Invest and FE Transmission.

FE Analytics

FE Analytics is a powerful tool fit for all our investment research and analysis, portfolio construction, due diligence and ongoing monitoring, giving us more time to focus on our clients knowing due diligence is duly being conducted. It's at the heart of our Centralised Investment Propositions.

FE Invest

Is a suite of risk optimised model portfolios targeted at the complete range of investor risk profiles. The investment approach leverages the efficiency of cutting edge technology with the oversight of experienced professionals with a proven track record of expertise to deliver an optimal investment service to our clients.

FE Transmission

Is designed to provide a complete picture of information relating to Discretionary Fund Managers and Model Portfolio Providers allowing Advisers to make bespoke comparisons of our clients' portfolios with benchmarks of our choice to monitor investments. It gives us access to governance reports, portfolio models information, historic performance, fact sheets, rebalance reports on the whole of the market.

Intelligent Office (IO)

Our back office system is run by Intelligent Office, an entire technology ecosystem which integrates with all stages of our advice process.

Assurweb

Assurweb is a quote, comparison and application portal designed to scan the whole of the market from 35 providers covering over 200 products allowing advisers to produce independent quotes and recommend the product best suited to their clients' needs and goals.

Personal Finance Portal

Personal Finance Portal is a revolutionary app that enables you to view all your finances, including up-to-date portfolio valuations from most providers, in one place 24/7 from any mobile or web device. The portal security is of the highest level, matching that of internetbanking. PFP gives you a very comprehensive picture of your entire financial position.

It also has a secure Document Vault so you can house all your financial documents and know they are secure and fully backed up. Another feature we particularly like is the secure messaging one. With email and post increasingly open to being intercepted, we favour this communication method with the peace of mind of knowing that any information we share is encrypted and completely private. Throughout our relationship, it is the way of communication we will use, may it be to send you updates of your case progress or yearly statements, etc. We see PFP as the perfect excel document we all have tried to produce and yet struggled to keep up-to-date.

EValue

EValue is a premium fintech provider who rigorously processes the world of risk and presents in a way that works best for our clients, driving best informed investment decisions at every level. For the last 20 years, Evalue has been the first choice for the largest financial services providers in the UK thanks to its advanced processing power and accessibility, power of stochastic modelling, development of holistic retirement models and a unique portfolio-optimising technology and influential tools.

Voyant

Voyant helps advisers and clients plan by adapting to real life events, before, during and after they happen. It's interactive, easy to use, and collaborative, meaning advisers and clients can work together to make smarter, more tangible financial decisions. With Voyant, you get all the information you need to answer every "what-if" scenario.