



## CURO Integrations - live and planned

Connecting the financial advice & wealth management industry

# CURO Integrations

Integrated Customer	Advisor Tools	Platforms	Valuations	Transactions	Remunerations
AJ Bell			Bulk feed		
AJ Bell Custody Centre			Bulk feed		Bulk feed
Aegon Platform (formerly Cofunds)			Bulk feed		Bulk feed
Aegon Retirement Choices (ARC)			Bulk feed		
Aegon (Scottish Equitable)			CE feed: B E P WL		Bulk feed (EDI)
AdviceBridge					
Advice Front					
Amati Global			Manual upload		
Amber Financial Investments			Manual upload		
Ascentric (Wrap)			Bulk feed		Manual upload
Aviva Platform			Bulk feed	Bulk feed	Bulk feed (EDI)
Aviva (formerly Friends Life)					Bulk feed (EDI)
AXA			Manual upload		Bulk feed (EDI)
Bordier & Cie			Bulk feed		
Brooks Macdonald			Bulk feed		
Brooks Macdonald International			Manual upload		
Canada Life			CE feed: B E P WL		
Canada Life International			CE feed: B E P WL		
CashCalc					
Clerical Medical			CE feed: B CI P		
ClickDimensions					
Close Brothers			Manual upload		
Comentis					
DocuSign					
Dunstan Thomas					
Dynamic Planner					
Expersoft					
FE Analytics	System data				
FE Fundinfo	System data				
Fidelity Fundsnetwork			Bulk feed		Bulk feed
FinCalc					
Fundment			Bulk feed		
Genovo					
Hubwise					Bulk feed
iFAST Platform			Manual upload		
IMiX					
IFA Dataflow					
iPipeline					
Investec Capital Asia			Manual upload		

Live	In progress	In vision
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Investec Wealth & Investment			Manual upload		
Investment Fund Services (IFSL)			Bulk feed		
James Hay			Bulk feed		
Legal & General*			CE feed: P		Bulk feed (EDI)
Liverpool Victoria (LV=)			CE feed: P		Bulk feed (EDI)
M-Files					
Margetts Fund Management			Bulk feed	Bulk feed	
Metis Asset Management			Bulk feed (Credo)		
Microsoft SharePoint					
Model Office					
Moneyinfo					
Mortgage Brain					
Moventum			Manual upload		
Multrees			Bulk feed		
Nedbank Private Wealth			Manual upload		
NN Belgium			Manual upload		
Novia Financial			Bulk feed		Bulk feed
Nucleus Financial			Bulk feed	Bulk feed	
O&M Profiler					
Old Mutual Wealth*			Bulk feed		Bulk feed (EDI)
Oxford Risk					
Parmenion Capital Partners LLP			Bulk feed		
Papercloud (Watermark)					
Pershing Securities			Bulk feed		
Powerplanner					
Praemium			Bulk feed		
Prudential			CE feed: B P Bulk feed in prog.		Bulk feed (EDI)
Prydis / P1					
P1 Investment Management			Bulk feed		Bulk feed
SelectaPension					
Quilter Cheviot			Bulk feed		
Quilter International			Manual upload		
Rathbones			Manual upload		
Raymond James					
ReAssure*			CE feed: B P		Bulk feed
RL360			Manual upload		
Royal London			CE feed: B P		
Sanlam			Bulk feed		
Sarasin			Bulk feed		
Scottish Widows*			CE feed: B CI P		Bulk feed (EDI)

Live

In progress

In vision

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SEB Life International			Manual upload		
Seccl Platform			Bulk feed		Bulk feed
Seven Invest. Management (7IM)			Bulk feed		Manual upload
SmartSearch					
Standard Life			CE feed: B CI E P		Bulk feed (EDI)
Standard Life (Wrap & Fundzone)			CE feed: B CI Wr		
Standard Life Elevate			Manual upload		Bulk feed (EDI)
Swissquote			Manual upload		
Transact			Bulk feed		Manual upload
Tilney Investment Management			Bulk feed		
Utmost PanEurope			Manual upload		
Utmost Wealth			Manual upload		
Virtual Cabinet					
Voyant					
Waverton Investment Management			Manual upload		
Wealthtime			Bulk feed		
XperiDo					
Xpertdoc / Smart Flows					
Zurich*			Manual upload		Bulk feed (EDI)
Zurich International			Manual upload		

Live

In progress

In vision

\* = May not be available for all products from this provider. Please ask about availability

#### Valuation types:

Bulk feed: An automated service from the provider

CE feed: An automated Contract Enquiry service that operates plan-by-plan

Manual upload: A bulk CSV file uploaded into CURO

Contract Enquiry types: B = Bond, CI = Collective Investment, E = Endowment, P = Pension, WL = Whole life protection, Wr = Wrap

#### Remuneration types:

Bulk feed: An automated service that collects statements directly from the provider

Bulk feed (EDI): An automated service that collects statements in EDI format from OpenText who act as an intermediary

Manual upload: A statement CSV file uploaded into CURO