

TIME  **ADVICE**

CURO Provider Services

Q2 2024

CURO Provider Services

Provider	Valuations			Transactions	Remunerations	
	Bulk Feed	Manual Upload	Contract Enquiry	Bulk Feed	Bulk Feed	Manual Upload
Abrdn			B C I E P		LIVE	
Abrdn Elevate		LIVE			LIVE	
Abrdn Wrap	In progress		B C I Wr			
Aegon (Cofunds)	LIVE				LIVE	
Aegon One Retirement	In progress					
Aegon Retirement Choices (ARC)	LIVE					
Aegon Scottish Equitable			B E P WL		LIVE	
AJ Bell Custody Centre	In progress					
AJ Bell Investcentre	In progress					
Amati Global Investors Ltd		LIVE				
Amber Financial Investments		LIVE				
Atomos (Sanlam)	In progress					
Aviva (Friends Life)			B P Wr		LIVE	
Aviva Platform	LIVE			LIVE	LIVE	
AXA		LIVE				
Bordier & Cie (UK) Plc	LIVE					
Brewin Dolphin		LIVE				
Brooks Macdonald AM (International)		LIVE				
Brooks Macdonald Asset Management	LIVE					
Canada Life			B E P WL			
Canada Life International			B E P WL			
Clerical Medical			B C I P			
Close Brothers Investment Limited		LIVE				
Downing Corporate Finance Limited		LIVE				
Evelyn Partners (Tilney Investment)	LIVE					
Fidelity Adviser	LIVE				LIVE	
Friends Provident International		LIVE				
Fundment	LIVE					
Hubwise	LIVE				LIVE	
iFAST Platform Hong Kong		LIVE				
iFAST Platform Singapore		LIVE				

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	Bulk Feed	Manual Upload	Contract Enquiry	Bulk Feed	Bulk Feed	Manual Upload
Ingenious Media		LIVE				
Invesco Perpetual		LIVE				
Investec Capital Asia		LIVE				
Investec Wealth & Investment		LIVE				
Investment Fund Services (IFSL)	LIVE					
James Hay	LIVE					
Legal & General			P		LIVE	
Liverpool Victoria (LV=)			P		LIVE	
M&G Wealth Platform (Ascentric)	LIVE					
Margetts Fund Management	LIVE			LIVE		
Morningstar Wealth Platform (Praemium)	LIVE					
Moventum		LIVE				
Multrees Investor Services	LIVE					
Nedbank Private Wealth		LIVE				
NN Belgium		LIVE				
Novia Global		LIVE				
Nucleus Financial	LIVE			LIVE		
OneLife		LIVE				
P1 Platform	LIVE				LIVE	
Parmenion Capital Partners LLP	LIVE					
Prudential	In progress		B P		LIVE	
Puma Investments		LIVE				
Quilter Cheviot	LIVE					
Quilter International		LIVE				
Quilter Investment Platform (OMW SIS)	LIVE				LIVE	
Rathbone Investment Management Ltd		LIVE				
RL360		LIVE				
Royal London	In progress				LIVE	
Schroder Investment Management Ltd		LIVE				
Scottish Widows			B CI P		LIVE	
Scottish Widows Platform (formerly Embark)	In progress					
SEB Life International		LIVE				
Seccl	LIVE				LIVE	
Seven Investment Management (7IM)	LIVE					LIVE
Swissquote		LIVE				
Time Investments		LIVE				
Transact	LIVE			In progress		LIVE
Triple Point Investment LLP		LIVE				

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	Bulk Feed	Manual Upload	Contract Enquiry	Bulk Feed	Bulk Feed	Manual Upload
Utmost PanEurope		LIVE				
Utmost Wealth		LIVE				
Waverton Investment Management		LIVE				
Wealthtime (Novia Financial)	LIVE				LIVE	
Wealthtime Select (formerly Wealthtime)	LIVE					
Zurich		LIVE			LIVE	
Zurich International		LIVE				

Valuation types:

Bulk feed: An automated Valuation 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 through the Valuation Uploader

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, or from OpenText in EDI format.

Manual upload: A statement CSV file uploaded into CURO through the Statement Uploader.



About us

Formed in 2010, we're entirely focused on financial planning and wealth management technology. We're practitioner led. In fact, one of our founders was previously IFA of the year. This means we're rooted in the challenges advisers face. Our hand-picked team combines technical expertise with a profound understanding of the financial planning and wealth management.

Today, we serve over 4,000 advisers and provide a digital transformation platform that delivers frictionless omni-channel client experiences, the ability to serve more clients, centralised data, reduced risk, and significant operation efficiencies.

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