

TIME  ADVICE

CURO Provider Services


Q3 2022

CURO Provider Services

Provider	Valuations			Transactions	Remunerations	
	Bulk Feed	Manual Upload	Contract Enquiry	Bulk Feed	Bulk Feed	Manual Upload
AJ Bell Invest Centre	●				●	
AJ Bell Custody Centre	●				●	
Aegon (Cofunds)	●				●	
Aegon Retirement Choices (ARC)	●					
Aegon One Retirement	●				●	
Aegon (Scottish Equitable)			B E P WL		●	
Amati Global		●				
Amber Financial Investments		●				
Ascentric (Wrap)	●					
Aviva	●			●	●	
Aviva (Friends Life)					●	
AXA		●			●	
Bordier & Cie	●					
Brewin Dolphin		●				
Brooks Macdonald	●					
Brooks Macdonald International		●				
Canada Life			B E P WL			
Canada Life International			B E P WL			
Clerical Medical			B C I P			
Close Brothers		●				
Downing LLP		●				
Evelyn Partners (Tilney Investment)	●					
Fidelity Adviser	●				●	
Friends Provident International		●				
Fundment	●					
Hubwise	●			●	●	
iFAST Platform Hong Kong		●				
iFAST Platform Singapore		●				
Ingenious		●				
Investec Capital Asia		●				
Investec Wealth & Investment		●				



Live



In progress

Provider	Valuations			Transactions	Remunerations	
	Bulk Feed	Manual Upload	Contract Enquiry	Bulk Feed	Bulk Feed	Manual Upload
Investment Fund Services (IFSL)	●					
James Hay	●					
Legal & General*			P		●	
Liverpool Victoria (LV=)			P		●	
Margetts Fund Management	●			●		
Metis Asset Management	●					
Metropolitan Life Ins. (MetLife)			B C I P			
Moventum		●				
Multrees	●					
Nedbank Private Wealth		●				
NN Belgium		●				
Novia Financial	●				●	
Novia Global		●				
Nucleus Financial	●			●		
Old Mutual Wealth*	●				●	
OneLife		●				
Parmenion Capital Partners LLP	●					
Praemium	●					
Prudential		●	B P		●	
Puma Investments		●				
Quilter Cheviot	●					
Quilter International		●				
Quilter Investments (OMW SIS)						
Rathbones		●				
RL360		●				
Royal London			●			
Sanlam	●					
Sarasin	●					
Schroder		●				
Scottish Widows*			B C I P		●	
Swissquote		●				
SEB Life International		●				



Live



In progress

Provider	Valuations			Transactions	Remunerations	
	Bulk Feed	Manual Upload	Contract Enquiry	Bulk Feed	Bulk Feed	Manual Upload
Seccl	●				●	
Seven Investment Management (7IM)	●					●
Standard Life			B CI E P		●	
Standard Life (Wrap and Fundzone)			B CI Wr			
Standard Life Elevate		●			●	
Swissquote		●				
Transact	●			●		●
Time Investments		●				
Triple Point Investment LLP		●				
Utmost Wealth		●				
Waverton Investment Management		●				
Wealthtime	●					
Zurich*		●			●	
Zurich International		●				

● Live	● In progress
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* = May not be available for all products from this provider. Please ask about availability

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.

TIME ADVICE

About Time4Advice

Time4Advice is owned by IntegraFin Holdings plc, the parent company of Transact, the leading investment wrap platform. We're entirely focused on financial planning and wealth management technology.

We're practitioner led. In fact, one of our founders was previously *'Financial Adviser of the Year'*.

Our mission is to disrupt financial planning and wealth management technology. For far too long technology providers have failed to deliver the panacea of benefits promised. We're out to change that. It is why we have teamed up with Microsoft to create CURO, our end-to-end financial planning & wealth management CRM, client portal, advice, and back-office system which is built on Microsoft Dynamics 365 and deployed on the Power Platform.