

AdviserNETgain LAUNCHES MAJOR INTEGRATION WITH BT WRAP

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For immediate release:

Online financial planning solution AdviserNETgain has released an in-depth integration with investment platform BT Wrap.

The integration delivers a more seamless service to advisers and will increase their productivity.

AdviserNETgain combines client, practice and advice management processes into one easy-to-use system that integrates advisers' front and back office.

The integration sees:

- Direct movement of data from BT Wrap to AdviserNETgain leading to a more reliable and accurate transfer of data. This eliminates the need for advisers and other personnel to spend time updating data when generating portfolio reviews
- A single log-on meaning users logging on to AdviserNETgain are automatically logged on to BT Wrap
- The ability to move immediately from viewing a client's details on AdviserNETgain to viewing the same client's details on BT Wrap - without having to search for the client
- Details on fees and transaction summaries from BT Wrap automatically inserted into advice documents generated by AdviserNETgain.

National Manager of AdviserNETgain, Darelle Jenkins, said the integration was another significant step in improving advisers' productivity and enabling advisers to provide timely and accurate service and advice to their clients.

"AdviserNETgain is an important tool available to BT Financial Group's aligned dealers. This major integration provides advisers with accurate, up-to-date information and effortless access to BT Wrap. The more up-to-date information AdviserNETgain has access to, the better clients can be served."

Head of BT Wrap, Chris Freeman, said BT Wrap users would be well-served by the improved integration between the systems.

"Many advisers who are currently using AdviserNETgain have portfolios in BT Wrap. This integration makes providing advice and ongoing service to clients with BT Wrap holdings extremely efficient."

BT Financial Group

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