

**UNDER EMBARGO UNTIL 09:00AM 26<sup>th</sup> May 2021**

## **Ian McKenna expands FTRC proposition with information hub dedicated to adviser software**

- FTRC website, [AdviserSoftware.com](https://www.advisersoftware.com) officially launches its dedicated information hub to provide advisers with free access to in-depth levels of information on all the advice technology available to them all in one place
- The site will roll out 18 specialist practice areas over the coming months including Wealth Practice Management Systems, Personal Finance Management, RegTech Systems and much more

**26<sup>th</sup> May 2021:** FTRC has today launched a dedicated information hub on [AdviserSoftware.com](https://www.advisersoftware.com) – the ultimate destination for financial advisers, wealth managers and mortgage brokers – providing advisers with a one stop shop of everything they need to know about the technology available to them to better run their businesses.

The technical service is designed to provide in-depth analysis on the software available to advisers, and offers insight into functionality comparison between systems, hygiene factors they should seek and the value that can be added by different technologies. Advisers will benefit from a more detailed understanding not only of the products available, but which ones are most suited to their individual business needs, and in turn help them make better, more informed decisions to get the best value out of technology spend.

With the first six specialist practice areas available from today, a further 12 dedicated specialist practice areas will be rolled out on the site over the next few months. These include:

### **Available from today:**

1. Wealth Practice Management Systems
2. Mortgage Practice Management Systems
3. Client Portals
4. Personal Financial Management
5. Risk Profiling
6. Financial Planning, Cash Flow Modelling & Retirement Planners

### **To be launched in July:**

7. Portfolio Analysis
8. Portfolio Rebalancing
9. Switching Analysis
10. Quotation Portals
11. Research Systems
12. Mortgage Sourcing Systems

### **To be launched in September:**

13. Wealth Management Systems
14. RegTech Systems
15. Report Generation Software
16. Equity Release Systems
17. Secure Communication Systems
18. Smart Systems (voice recognition, marketing communications etc.)

Launched by Ian McKenna, industry veteran and founder of umbrella company, FTFC, AdviserSoftware.com is one of three FTFC dedicated industry information hubs – the others are [ProtectionGuru.com](http://ProtectionGuru.com) and [BenefitsGuru.com](http://BenefitsGuru.com).

With over 25 years of fintech expertise and a deep awareness of adviser technologies, McKenna's ideas for AdviserSoftware.com was born out of a realisation that the industry is overwhelmed by the vast amount of software offerings for advisers.

**Commenting on the launch, McKenna said:** "There's never been more adviser technology around than there is today. It is such a huge subject and many advisers simply do not have the time to research all the adviser technologies available to them. Our mission is to help advisers here, by giving them a single destination to understand more about all the players out there, not just the well-known ones."

"Perhaps the most well-known saying on advice technology came from former Morningstar Chief Product Officer, Tricia Rothschild, who famously said *"technology won't replace advisers, but the advisers who use technology will replace the advisers who don't"*. This couldn't be a more accurate observation; advisers need technology for every point of their business process, which is why it is essential that they choose the right tools correctly, to get the most benefit out of their tech spend."

**Jon Dear, Group Operations Director at LEBC Group, commented:** "This new AdviserSoftware.com service is a goldmine of information for any advice firm looking to find the technology that best suits the need of their business and their clients. In so doing, they can operate more efficiently, reduce costs and enhance customer service. The industry has needed something like this for a long time and it is great to see it arrive."

**ENDS**

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### **About FTFC**

Established in 1995, the Finance Technology Research Centre (FTFC) is a specialist research consultancy.

The company has four key areas of activity:

- Facilitating industry collaboration in the life assurance and long-term savings industries via a range of forums which bring together leading players from manufacturing, distribution and support services to identify where working together can achieve better outcomes for consumers and the industry.
- Research and benchmarking through the delivery of software and ratings to help financial advisers compare the quality of financial products, available at [www.qualityanalyser.com](http://www.qualityanalyser.com)
- Insight reports which focus on key strategic issues such as the future of financial advice and how organisations can enhance the quality
- Bespoke consultancy on any of the above