



The Spire Platform Solutions Portal

BUILDING BETTER CONNECTIONS



BETTER TECHNOLOGY. BETTER CONNECTIONS. BETTER BUSINESS.

The market is constantly evolving.

To survive and prosper your business needs to evolve with it.

The Spire Platform Solutions (Spire PS) Portal provides a unique, innovative solution catering for the needs created by an ever-changing marketplace.

BETTER FOR YOU

Quite simply, the Spire PS Portal allows wealth platforms and insurance companies to broaden their propositions to meet the developing needs of their clients.

In addition, Spire PS’s unparalleled experience and in-depth understanding of both sectors of the market ensures that our technology effectively ‘translates’ each party’s requirements into a language that the other immediately understands.

The Portal’s highly configurable technology delivers an end-to-end journey and, importantly, this means that your propositions can be ready for future developments too.

BETTER FOR USERS

We know that the user experience is a key to success - so our focus is always on providing an exceptional UX that makes even the most complex interactions completely understandable.

What’s more, by using API technology we can pre-populate key data items, making the process less time-consuming, more intuitive and simpler for end users.

It’s just part of our commitment to making better connections that build better business for you.



HOW THE SPIRE PS PORTAL CREATES BETTER CONNECTIONS

The Spire PS Portal allows users of Wealth Platforms to access products that are uniquely offered by Insurance Companies, neatly, easily and without frustration.

Take a look at the facts:

- **The Portal** allows Platforms and Insurers to broaden their propositions to serve a changing market – adding new products and helping them to transform their business.
- **The Portal** offers highly configurable technology that will adapt to meet your specific needs.
- **The Portal** delivers an exceptional user experience making life easier for advisers and their clients.
- **The Portal** is designed to receive and transmit information from any number of sources.
- **The Portal** facilitates a smoother end-to-end user journey, taking clients seamlessly from platform to quotation, right through to purchase.

For greater detail on how The Portal can help you connect with more customers and a better, broader range of products, use the details at the back of this brochure to get in touch with the Spire Platform Solutions team today.



A BESPOKE, CUSTOMISED SOLUTION

The Spire PS Portal allows you to create a tailored experience for your users, putting you firmly in control of your vision for digital engagement:

- **U/X:**
Creating a user experience that reflects the personality of your business is essential.
- **Branding:**
The Portal is completely configurable, and able to adapt and align with your branding requirements.
- **Adaptability:**
The Portal will work across all or any of the devices your users might use.
- **Configuration:**
It's your Portal and you can configure it to suit your unique and specific requirements.
- **Permissions:**
Access to the Portal can be set up to meet your individual business requirements.
- **GDPR:**
GDPR compliance is built into the portal with data being held securely and managed appropriately.

Speaking about working with Spire to use the Spire PS Portal to deliver a service, Shaun Allwright, former Commercial Director said:

"For delivering a market-first solution we couldn't have hoped for better than working with Spire to deliver the Secure Lifetime Income product onto our platform. The product itself was innovative and quite different from what we had offered before and so the Spire PS Portal that links into the Wealthtime Platform had to be flexible enough to not only meet the product providers requirements but also ours. From original concept through to delivery, the collaboration with Spire has suited our entrepreneurial approach and allowed us to deliver a solution that is both efficient for our users and enables us to continue to enhance the offering over coming years."



For further details of the case study please contact Spire PS.

DESIGNED TO INNOVATE

The Wealthtime, Secure Lifetime Income Case Study

The Spire PS Portal offers you a tried and tested means of creating better connections using the very latest technology.

The Portal has been used to bring the innovative guaranteed lifetime income product, Secure Lifetime Income (SLI), to market.

SECURE LIFETIME INCOME

- Offered by the insurer, Just, experts in annuities.
- Available on the Wealthtime and 7IM Platforms.
- Provides a guaranteed lifetime income whilst sitting alongside traditional invested assets within a SIPP wrapper.
- Forms part of a portfolio that reflects a client's individual income needs, risk appetite and capacity for loss.

Spire PS Portal has been key to delivering the product to market by connecting Just and Wealthtime together allowing them to offer:

- **Medically Underwritten Quotations**
- **New Business Purchase**
- **Reconciliations**
- **Valuations**

This product was entirely new to the market and contained a variety of highly innovative design features including a surrender value. It required the development of an entirely new way of working.

The needs of Just as an Insurer and those of Wealthtime as a Wealth Platform were quite different.

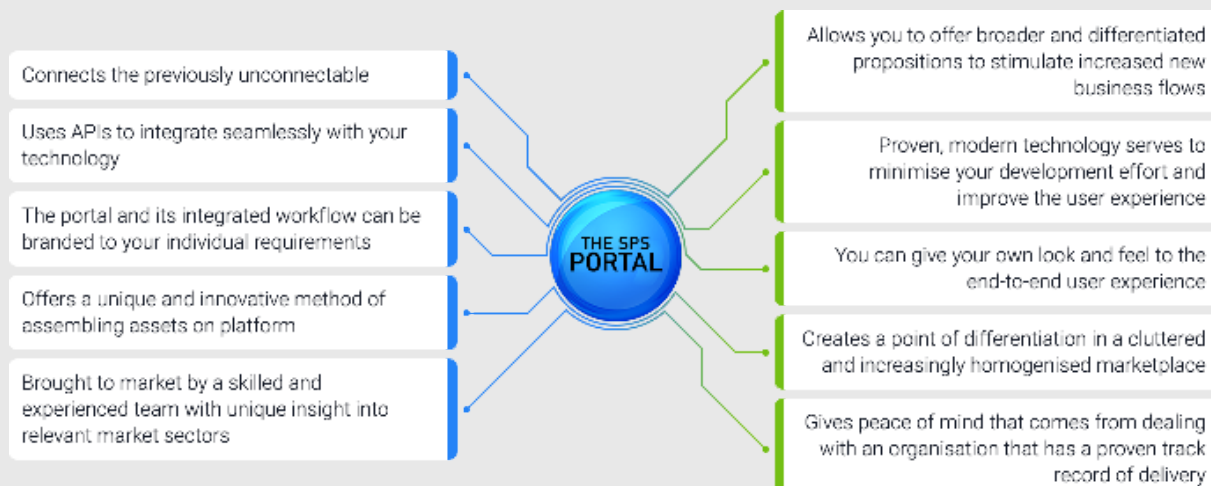
The fully-implemented Spire PS Portal now acts as the 'translator' - allowing them to transact business in their usual fashion. Simple, straightforward and intuitive, The Portal has facilitated the creation of an important new revenue streams for both partners.

THE SPIRE PS PORTAL TARGETED BENEFITS

★ Features

FOR PLATFORMS

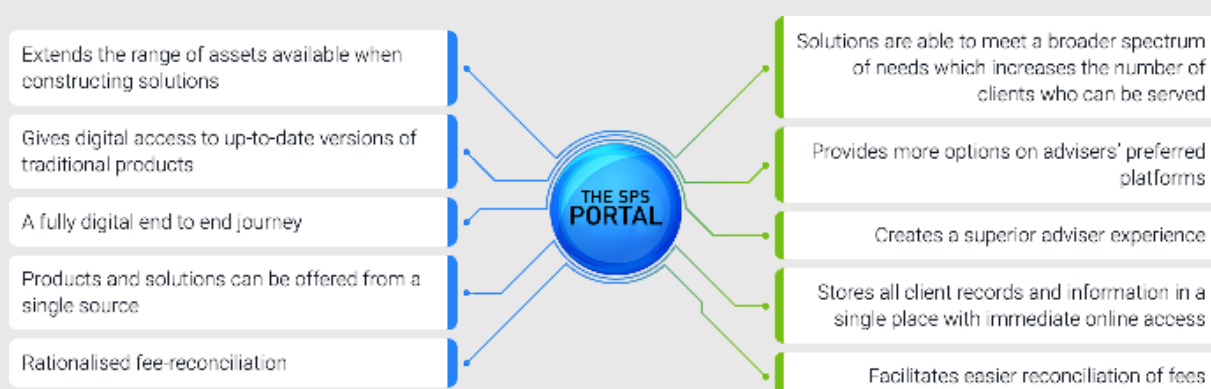
Benefits ✓



★ Features

FOR ADVISERS

Benefits ✓



★ Features

FOR THE CLIENT

Benefits ✓



COMMITTED TO BUILDING BETTER CONNECTIONS

To find out more about the Spire PS Portal or to request a personal presentation from a member of the Spire Platform Solutions team, simply use the details below:

Contact us

info@spireps.co.uk



Spire Platform Solutions Limited

Registered Office:

Spire Platform Solutions
Enterprise House
Bancroft Road
Reigate
RH2 7RP

Company Number: 11401397

