

Welcome to the Equisoft Accelerate Series

We'll get started shortly.

#EquisoftAccelerate

Equisoft Accelerate Series | Making Transfers Better



Making transfers better: Achieving faster, smarter transfers through integration

Wednesday 17th September 2025
10:00 am – 11:00 am GMT



equisoft.com

Agenda

1 Welcome and introductions

2 The Background

3 Current Market Landscape

4 The Art of Possible

5 Implementation

6 The Equisoft Solution

7 Q&A

8 Closing remarks

Speakers



Matt Smith

Product Manager

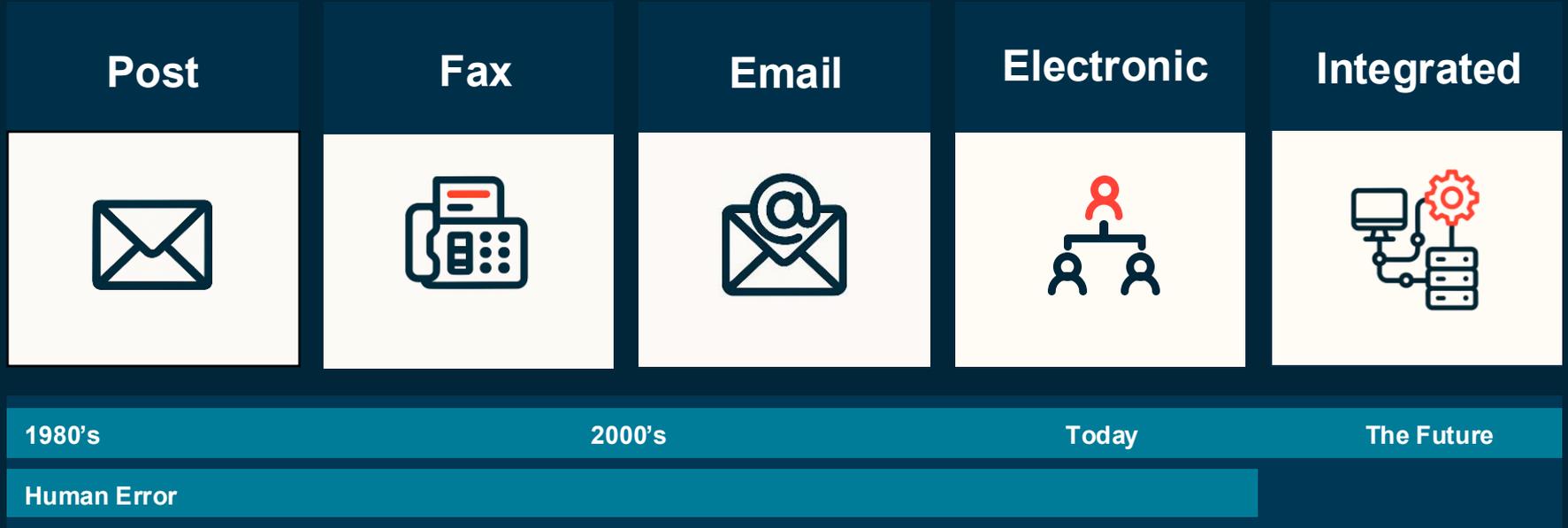


Howard Finnegan

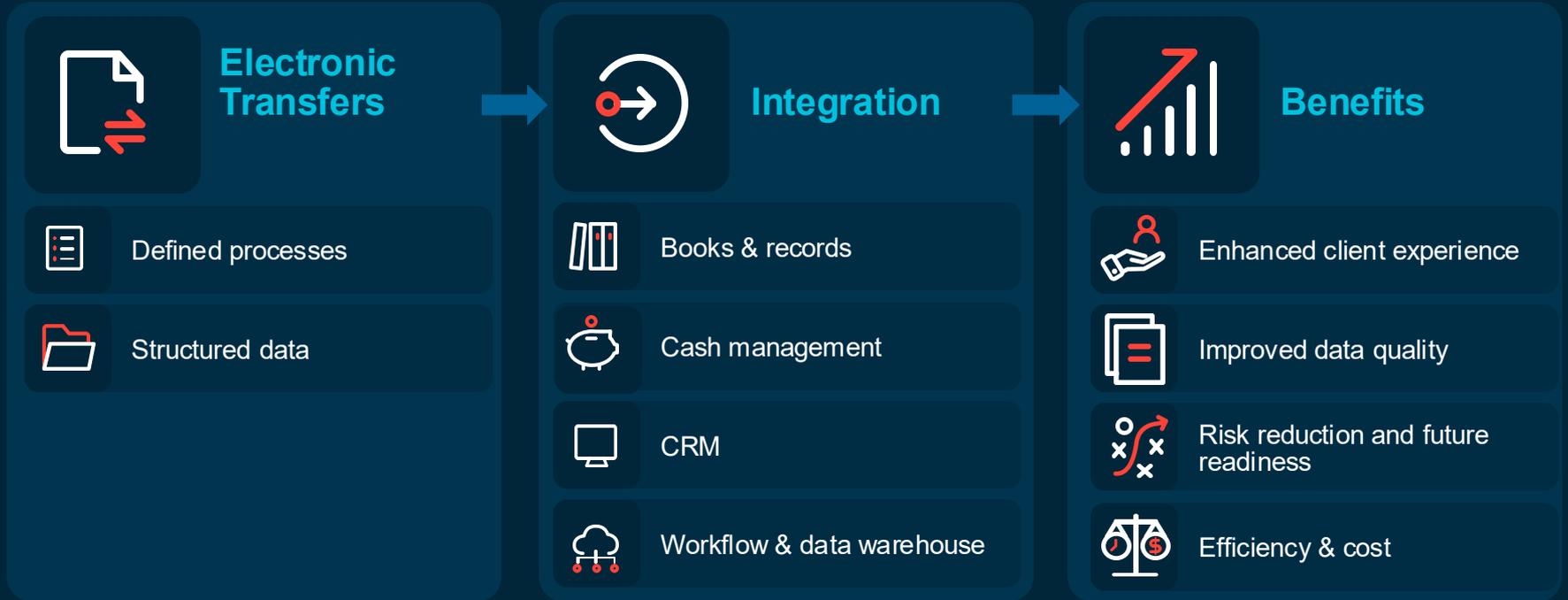
Product Sales Director

The Background

How Did We Get Here?



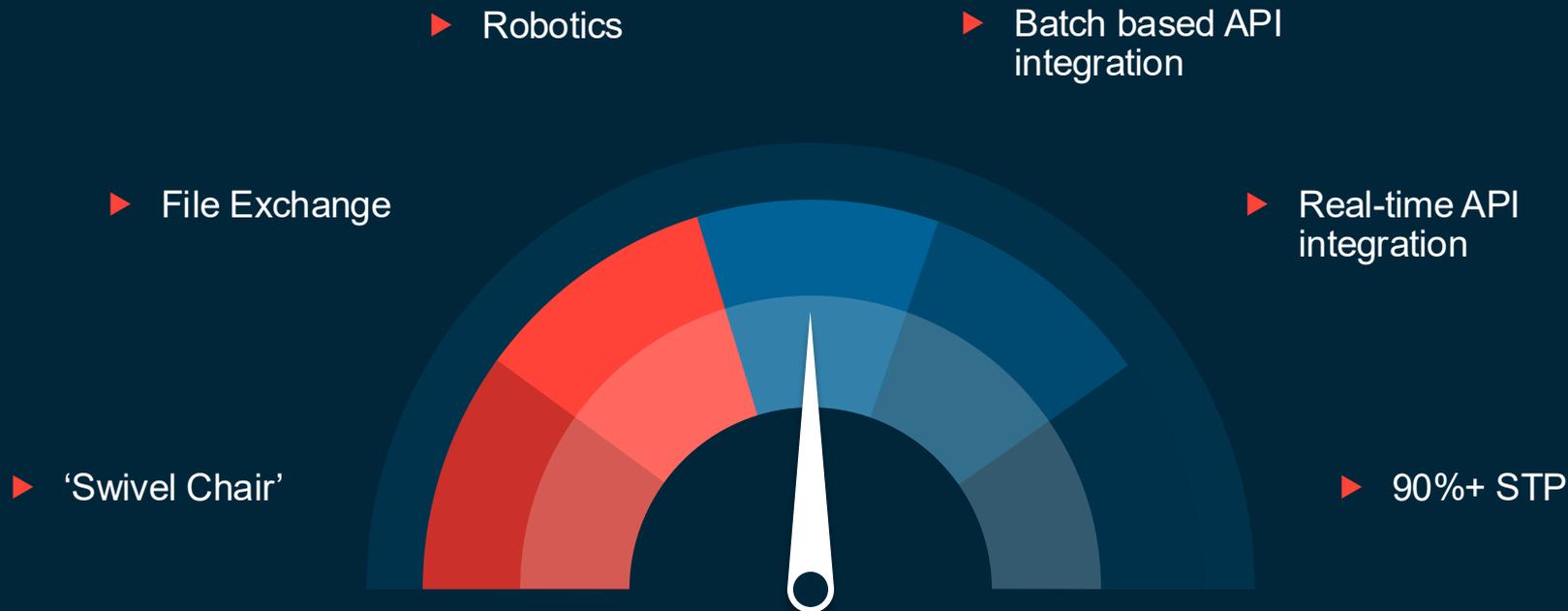
What integration delivers





Current Market Landscape

The Current Landscape Technology



The Current Landscape

Providers

▶ Advisor Platforms

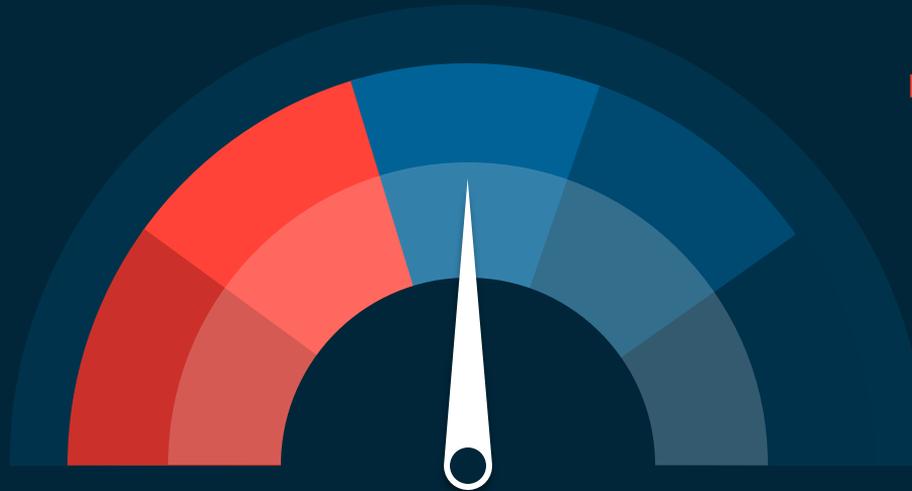
▶ D2C Platforms

▶ Custodians

▶ FinTechs

▶ Wealth Managers

▶ Fund Managers



Key Examples

**Creating
Transfers
(Only)**

**Wrappers
vs
Assets**

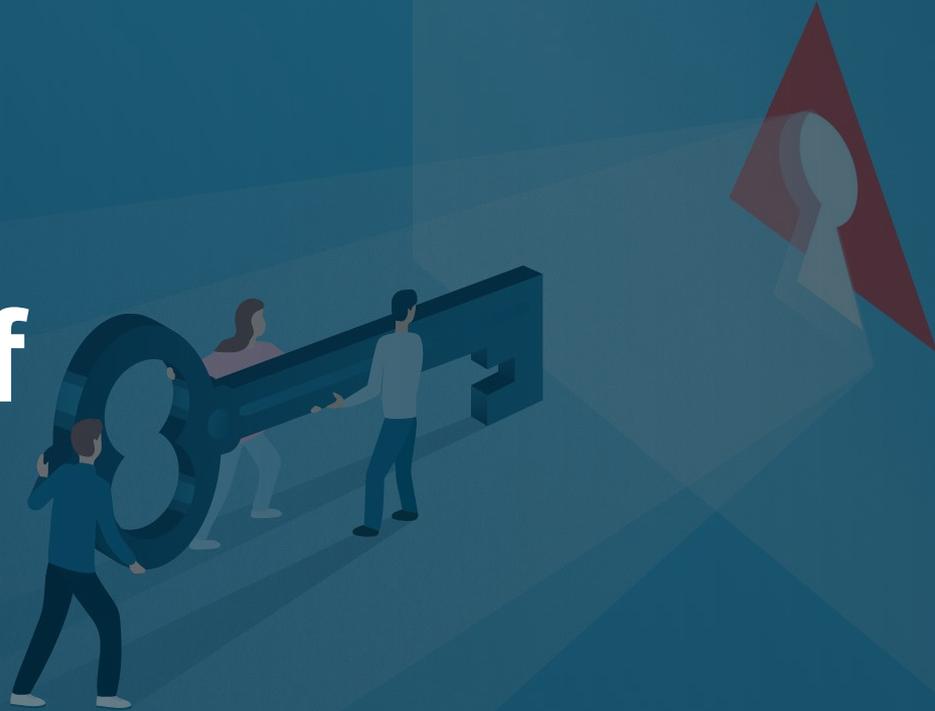
Cash Only

**Ins
vs
Outs**

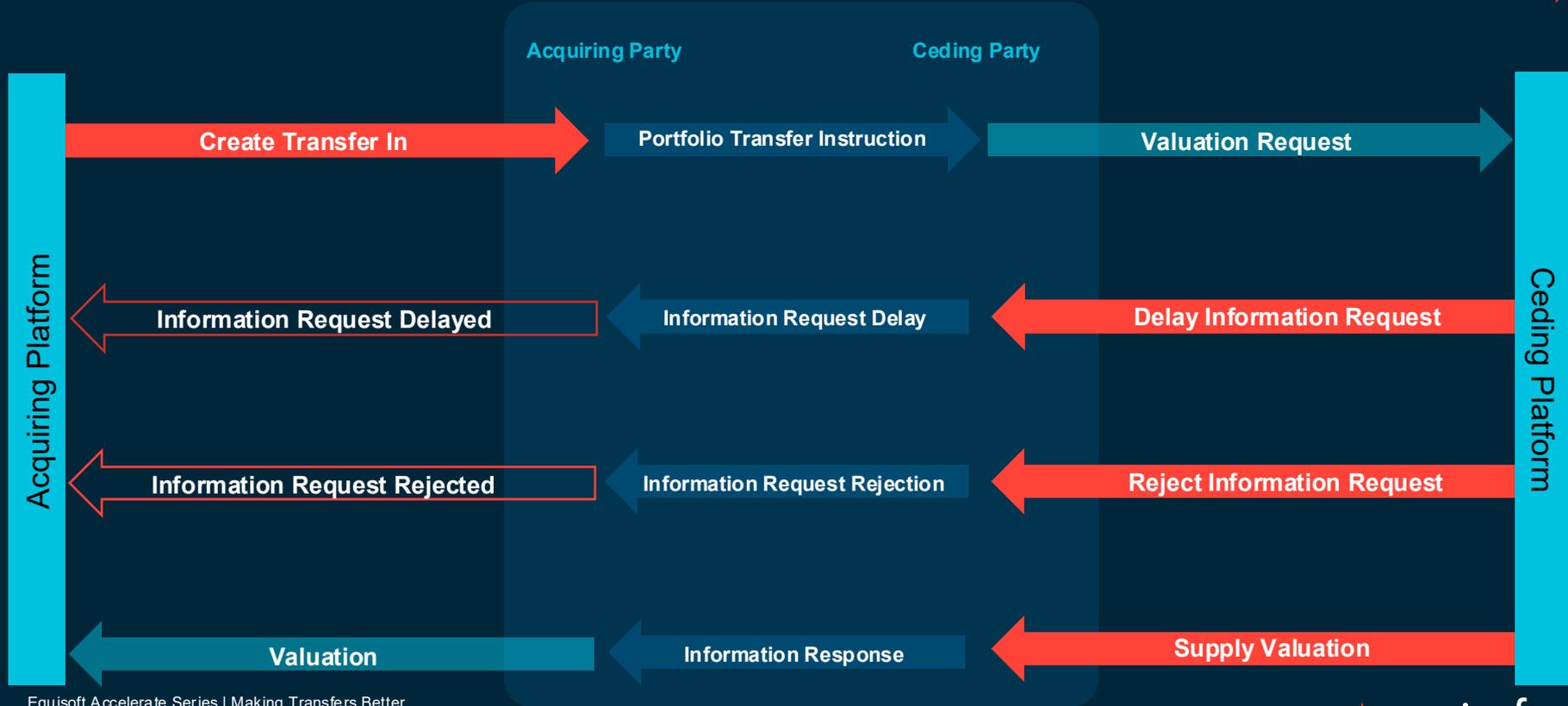
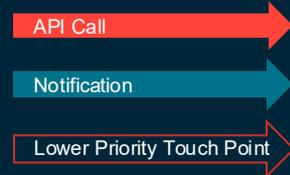
**ISA
vs
GIA
vs
Pension**

**Process vs
Information**

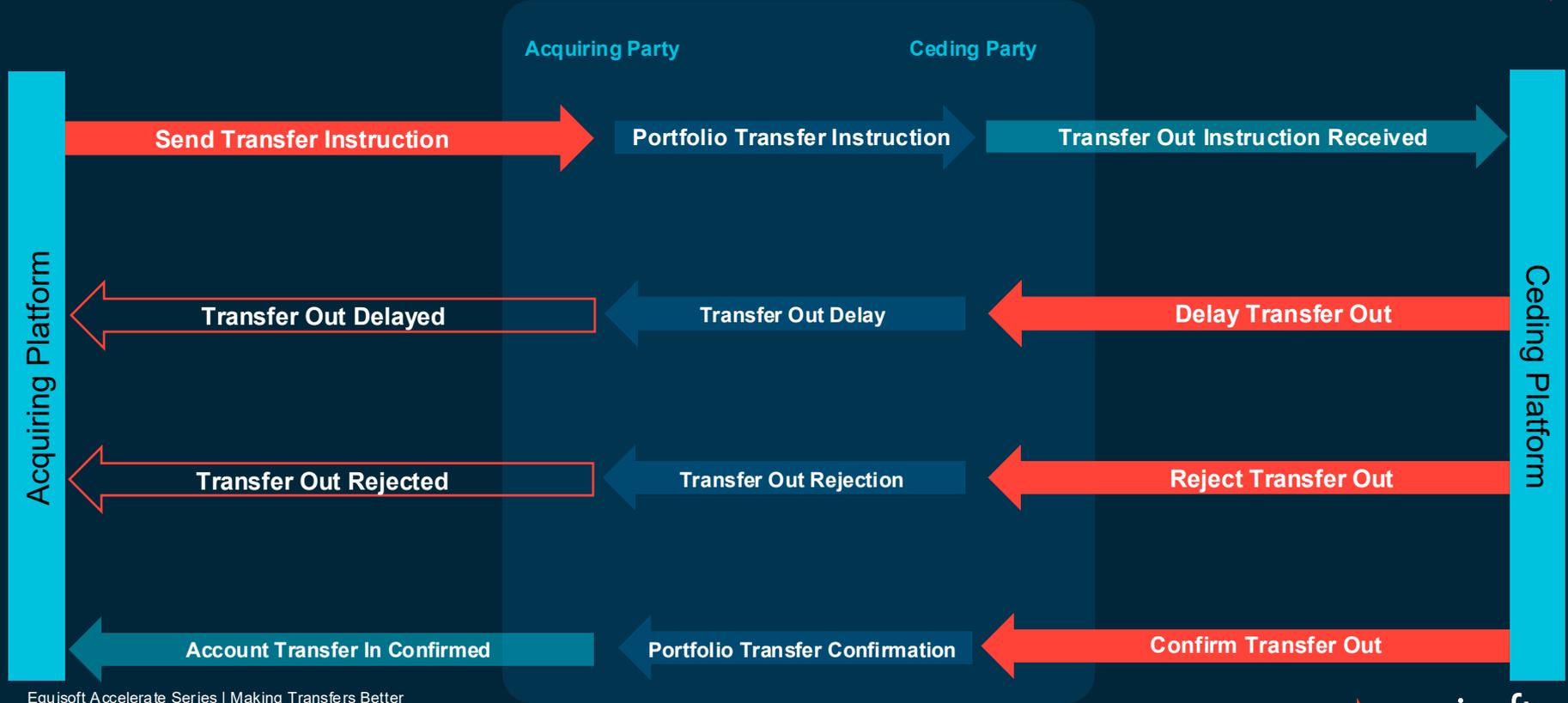
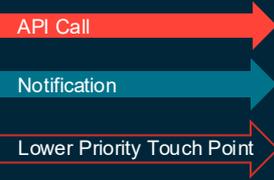
The Art of Possible



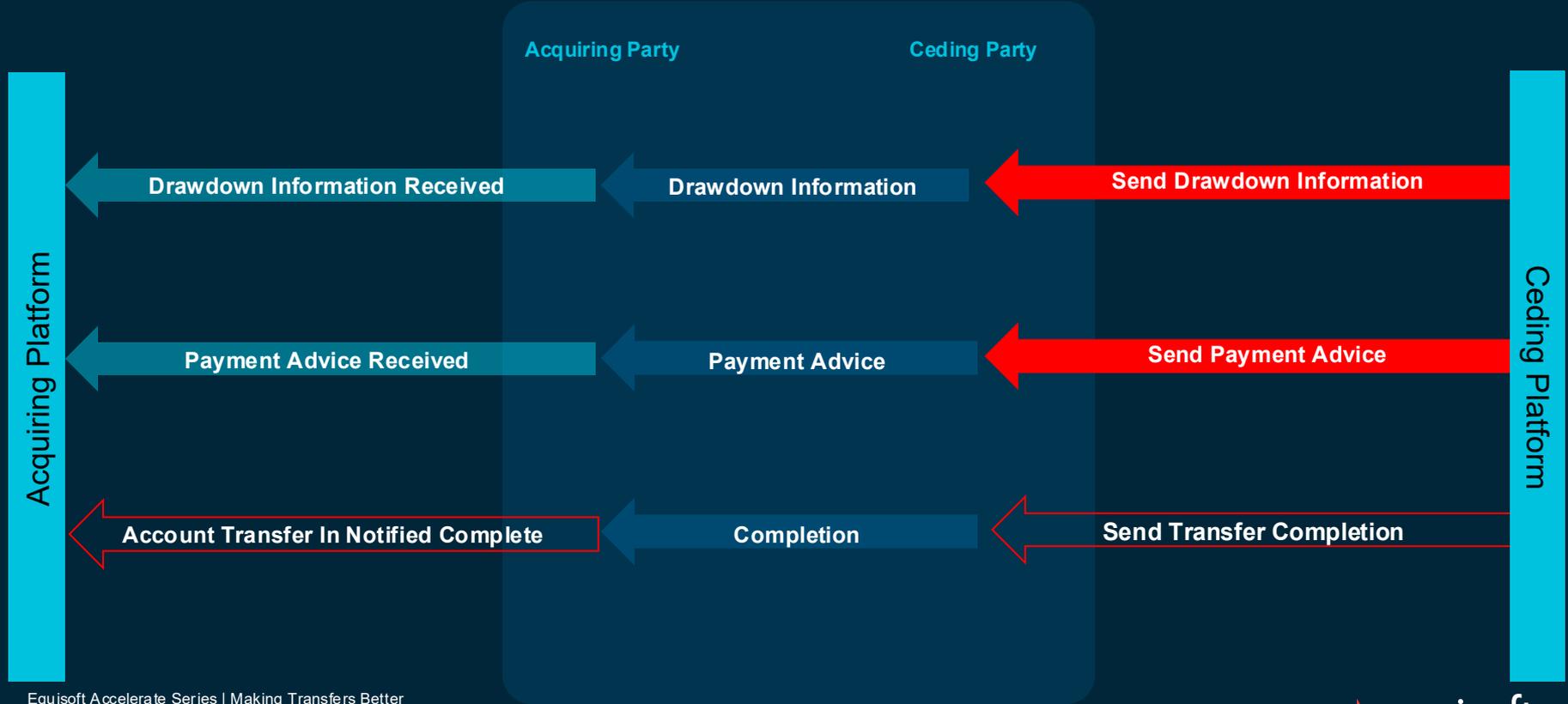
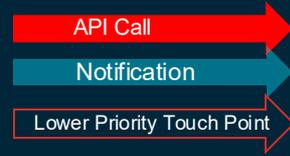
Integration Touch Points Portfolio Valuation



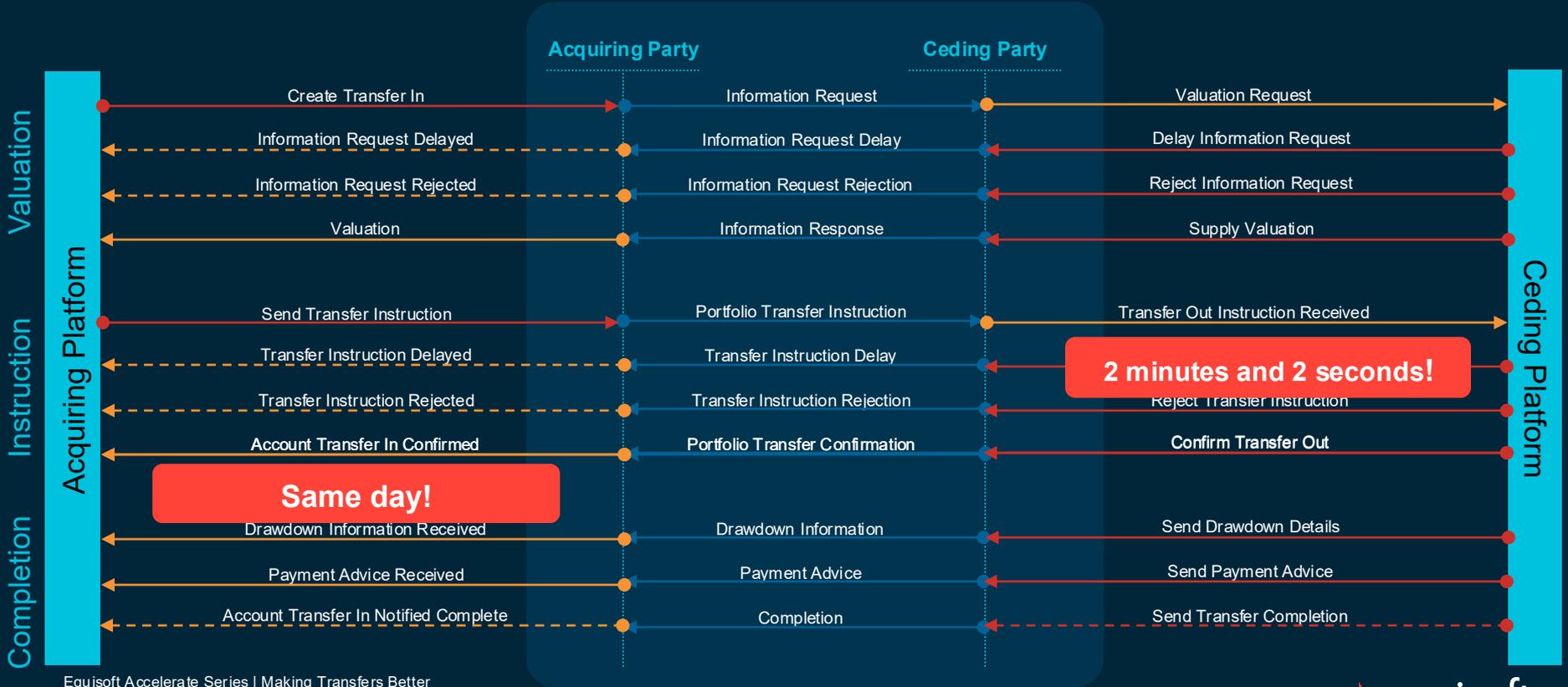
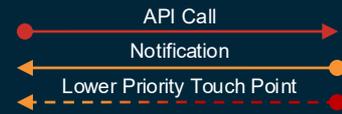
Integration Touch Points Portfolio Instruction



Integration Touch Points Portfolio Completion

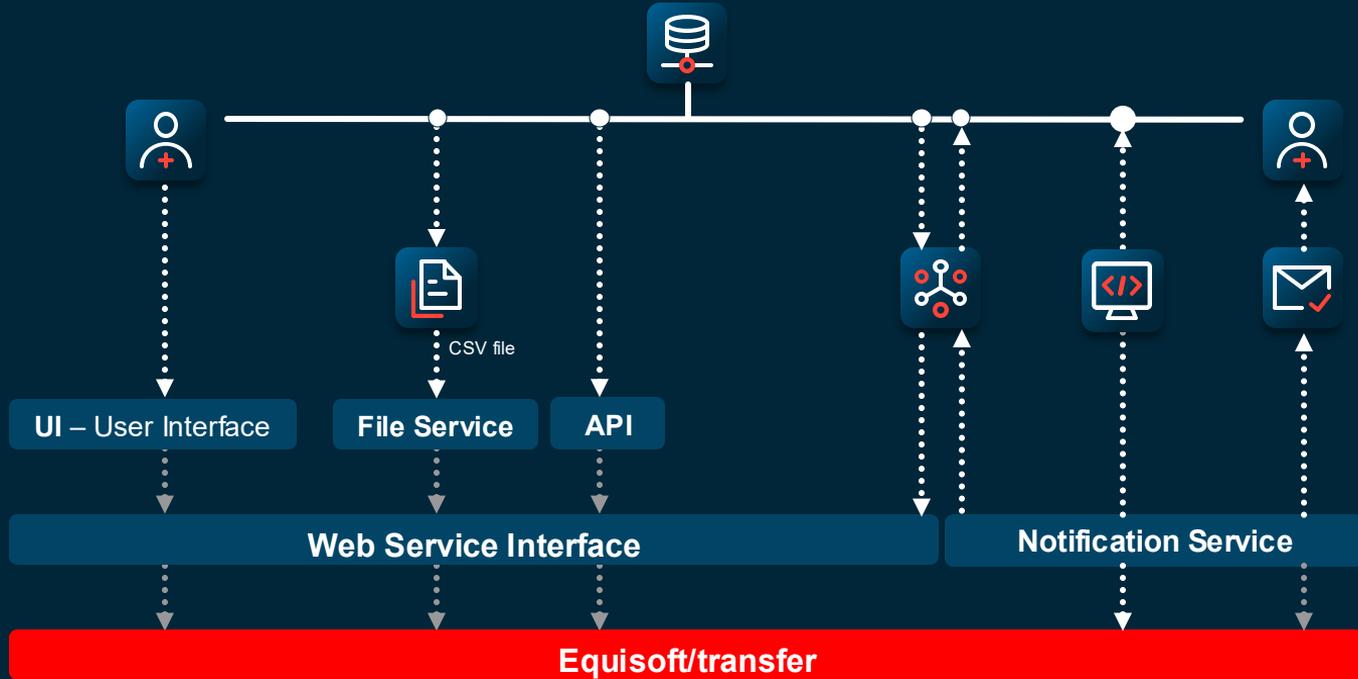


Integration Touch Points Portfolio



The Equisoft solution

Integration Pathways



Implementation



Integration Considerations



Where to invest?



Volumes



Integration
approach



Return on
investment (ROI)



Not just
transfers in



Client
experience



Risk



Journey



Start!



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BUSINESS-DRIVEN INNOVATION



Thank you for joining us today!

Don't miss the rest of the
Equisoft Accelerate Series
accelerate.equisoft.com

Matt Smith

Product Manager, Equisoft

Matt.Smith@equisoft.com

Howard Finnegan

Product Sales Director, Equisoft

Howard.Finnegan@equisoft.com

USA | Canada | Chile | South Africa | India | Australia | Colombia | UK | Trinidad

equisoft.com