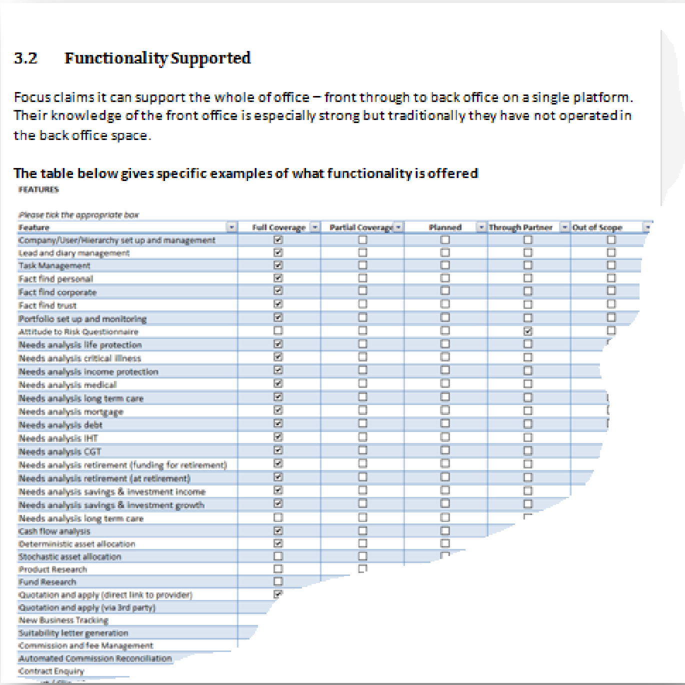
Practice Management Suppliers

AT8 has carried out a comprehensive review of the leading software solutions in the Adviser Practice Management marketplace. The report covers the suppliers that provide software to support Front, Back and Middle Office functionality along with CRM and other services such as some of the specialist tools to manage T&C, Compliance and both Product and Fund Research, all of which add real business benefit to their clients.

The report includes analysis on:

- 1st – The Exchange
- CCL
- Distribution Technology
- Durrell
- Focus
- IntelliFlo
- JCS
- Mortgage Brain – They Key
- Plum
- Prestwood
- SSP
- TrigoldCrystal – Momentum
- True Potential



3.2 Functionality Supported

Focus claims it can support the whole of office – front through to back office on a single platform. Their knowledge of the front office is especially strong but traditionally they have not operated in the back office space.

The table below gives specific examples of what functionality is offered

FEATURES

Please tick the appropriate box

Feature	Full Coverage	Partial Coverage	Planned	Through Partner	Out of Scope
Company/User/Hierarchy set up and management	☑	☐	☐	☐	☐
Lead and diary management	☑	☐	☐	☐	☐
Task Management	☑	☐	☐	☐	☐
Fact find personal	☑	☐	☐	☐	☐
Fact find corporate	☑	☐	☐	☐	☐
Fact find trust	☑	☐	☐	☐	☐
Portfolio set up and monitoring	☑	☐	☐	☐	☐
Attitude to Risk Questionnaire	☐	☐	☐	☑	☐
Needs analysis life protection	☑	☐	☐	☐	
Needs analysis critical illness	☑	☐	☐	☐	
Needs analysis income protection	☑	☐	☐	☐	
Needs analysis medical	☑	☐	☐	☐	
Needs analysis long term care	☑	☐	☐	☐	
Needs analysis mortgage	☑	☐	☐	☐	
Needs analysis debt	☑	☐	☐	☐	
Needs analysis IHT	☑	☐	☐	☐	
Needs analysis CGT	☑	☐	☐	☐	
Needs analysis retirement (funding for retirement)	☑	☐	☐	☐	
Needs analysis retirement (at retirement)	☑	☐	☐	☐	
Needs analysis savings & investment income	☑	☐	☐	☐	
Needs analysis savings & investment growth	☑	☐	☐	☐	
Needs analysis long term care	☐	☐	☐		
Cash flow analysis	☑	☐	☐		
Deterministic asset allocation	☑	☐	☐		
Stochastic asset allocation	☐	☐			
Product Research	☐	☐			
Fund Research	☐				
Quotation and apply (direct link to provider)	☑				
Quotation and apply (via 3rd party)					
New Business Tracking					
Suitability letter generation					
Commission and fee Management					
Automated Commission Reconciliation					
Contract Enquiry					

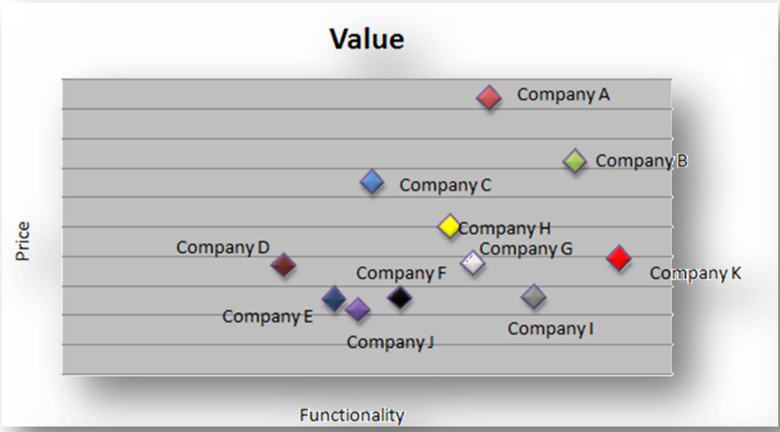
For each supplier, we look at the functionality supported, along with the areas of integration to other technology companies and integration to the product providers to support Contract Enquiry and Commission Reconciliation. We also look at the pricing strategies and the key strategic differentiators. Where available, we have also included case studies to help put the solutions into relevant context.

In addition to the detailed questionnaires, AT8 has had a series of demonstrations and interviews with vendors to try and confirm all information supplied. We have also applied our substantial industry knowledge and experience of working with the majority of the companies in this sector.

AT8 Group Limited, Gate House, 10 The Elms, Leek Wootton, Warwickshire, CV35 7RR
Telephone: + 44 (0) 121 314 2504 Facsimile: + 44 (0) 870 4794074
www.at8-group.com twitter www.twitter.com/at8group

We have then used a number of comparative tools to help the reader to understand which vendors are best placed to meet the different market needs. The comparison includes our own methodology for rating and weighting these scores for the front, middle and back office, as well as a score for integration capability and our own measure for 'Industry Standing' which illustrates the suppliers with a strong track record and proof points. We compare vendors support for contract enquiry and we also have a price comparison chart.

The report includes a number of high-level summaries on other systems such as T&C, financial planning tools and research tools with a guide to the leading players in this area.



The report is attractively priced at £2,500 + VAT and is ideally suited for distributors looking for help in gaining a comparative overview and context for their decision making in identifying in which systems to invest. It also helps Product manufacturers who may be looking to decide on which systems to integrate.

About AT8

AT8 Group Ltd is an innovative consultancy company with knowledge, skill and experience across a broad range of Financial Services and IT related disciplines.

Our experience with Providers, Intermediaries, Lenders and IT companies puts us in a strong position of understanding needs and opportunities. Our skills allow us to use our knowledge along with our ability to innovate, to create proactively and implement differentiated business improvement propositions that add tangible value to our financial services' clients and partners.

We produce regular, well respected market research on topics including our annual review of the quotation and new business portals. We also write a weekly technology column in Professional Adviser and IFAOnline while also producing a popular blog on our website www.at8-group.com/blog.

We can be followed on twitter - http://www.twitter.com/at8group

Our values are to be 'Open, Honest, Positive and Fair ' and our objective is to be 'Commended and Recommended' for what we do.

AT8 Group Limited, Gate House, 10 The Elms, Leek Wootton, Warwickshire, CV35 7RR
Telephone: + 44 (0) 121 314 2504 Facsimile: + 44 (0) 870 4794074
www.at8-group.com twitter www.twitter.com/at8group