



## PRESS RELEASE

### Vision Independent Financial Planning partners with FinCalc

COLCHESTER, ENGLAND – July 2022

IFA network Vision Independent Financial Planning Ltd has partnered with financial planning software provider FinCalc for the next 5 years.

FinCalc will provide their financial planning tools including cashflow modelling, retirement modelling, inheritance tax planning and a full range of financial calculators as part of the Vision IFP package for their advice firms.

FinCalc will also provide their client portal that includes client onboarding, secure messaging, document exchange, along with the Vision IFP digital fact find. Each AR firm will also have their own branding within the onboarding tool.

Vision Independent Financial Planning Ltd provides financial advisory services. The network of Appointed Representative Advisers provide advice upon a range of services inclusive of investments, retirement planning, inheritance tax planning, protection and can advise Individuals, Companies, Trustees, Charities, Court of Protection, Directors whilst also providing full independent advice.

Vision IFP is one of the largest UK IFA networks to add FinCalc to its proposition and FinCalc's CEO Jason Wykes said that this is another step forward, working with a greater number of large advice firms as their financial planning software partner.

Zoe King, Managing Director at Vision Independent Financial Planning said:

"We believe it is important to support our Appointed Representative Advisers with the latest technology to enable them to better engage with clients. That's why we are supplying FinCalc to all of our Appointed Representative Adviser firms and believe the partnership with FinCalc will enable us to take this client engagement to the next level."

Jason Wykes, CEO at FinCalc said:

"We are very excited by this partnership with Vision IFP as it highlights how far we have come since the release of FinCalc less than 2 years ago. We have built software that can enhance the financial planning process that works for small, mid-size and larger firms and we look forward to developing further tools to support Vision IFP and wider adviser community."



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## INFORMATION FOR EDITORS:

### About Vision Independent Financial Planning

Vision Independent Financial Planning Ltd is a dynamic and established network Appointed Representative Advisers throughout the country and a head office base in Falmouth, Cornwall where the company originally started. We are directly authorised by The Financial Conduct Authority and provide an Independent Financial Planning advice services to a range of private clients, corporate clients, charities, trusts and court of protection clients. Our advice is offered on a completely independent basis with no restraint or commitment to any products or providers. This allows the provision of the most appropriate advice from the whole of the market to Vision Appointed Representative clients, based entirely on their individual needs whilst utilising their Appointed Representative Advisers extensive experience in the financial services industry.

Vision Independent Financial Planning Ltd is authorised and regulated by the Financial Services Authority (FCA) Firm reference number 487395. The FCA do not regulate Inheritance Tax planning.

Contact information: [www.visionifp.co.uk](http://www.visionifp.co.uk)

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### About FinCalc

FinCalc is a leading provider of financial planning tools including cashflow modelling and DB transfer analysis software to UK financial advisers. FinCalc is the technology platform created by O&M Pension Solutions to ensure that advisers are equipped with user friendly tools that will help them provide their clients with fully comprehensive advice.

O&M Pension Solutions was setup as a separate company in 2013 as part of the split of O&M Systems and specialised in the TVC/TVA software and services market. Director Jason Wykes was part of the original team who setup O&M Systems in 1992.

Contact Information: [www.fincalc.co.uk](http://www.fincalc.co.uk)

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