

## **FinCalc integrates with CURO by Time4Advice**

COLCHESTER, ENGLAND – May 2021

Cashflow and DB transfer software provider FinCalc have today announced integration with leading financial planning and wealth management software solution CURO by Time4Advice.

The two-way integration means that users can quickly and seamlessly transfer their client personal and financial information between the 2 systems. This will remove any rekeying of information, reducing risk, saving time for advisers and improving the client review process.

All relevant client data and financial modelling information can be transferred between FinCalc and CURO. The effortless integration will pull through items such as income, assets, pensions, savings & investments, liabilities and expenses. Contributions, withdrawals and latest valuations will also be synced through this 2-way integration.

Reports can also be automatically uploaded into CURO from FinCalc. In addition, advisers can use the FinCalc client portal to get clients completing their financial information directly before uploading this into CURO.

Jason Wykes, Managing Director at FinCalc said:

*“Advisers have a right to expect systems to communicate with one another, not only to save time, but also to ensure that client information is updated consistently in all systems. This integration with CURO by Time4Advice is another step forward in our mission to provide Advisers with the best financial resources to help them better serve their clients.”*

Roland Rawicz-Szczerbo, Director at Time4Advice, said:

*“Unless advisers are able to work more efficiently and leverage the value from their most valuable asset, their client data, the industry will continue to be compromised as a result of the proliferation of disconnected data silos, a lack of process automation, and the use of multiple disconnected systems. We are on a mission to put that right. Therefore, we are delighted to have collaborated with FinCalc who share the same vision.”*

To find out more about the FinCalc integration with Time4Advice, please visit

<https://www.fincalc.co.uk/news/integration-with-Time4Advice/>



# PRESS RELEASE

## INFORMATION FOR EDITORS:

### **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)

Gavin Shears, Senior Product Consultant, on 01206 803210

### **About Time4Advice**

Time4Advice has teamed up with Microsoft to create CURO, the most modern financial advice solution in the market. CURO is an adviser technology eco-system that unifies a firm's entire business including, CRM, advice & servicing, and back-office.

In practical terms, CURO automates manual processes, creates a single-point-of-truth for all data, integrates with relevant third-party systems, and seamlessly unifies everyday business applications such as Office 365.

As a result, CURO enables firms to provide effective multi-channel advice and the ability to service more clients well. It also facilitates access to data, reduces risk and delivers significant operational efficiencies.

Built on Microsoft's Dynamics 365, CURO is underpinned by \$4bn annual investment by Microsoft in the underlying technology, AI and machine learning. This means Time4Advice's clients can be assured that CURO will remain at the forefront of modern advice technology and that it will enable them to take full advantage of future AI and machine learning opportunities.

Increased competition, the cost of compliance, the ability to unlock powerful insights from data, and the COVID pandemic needing to deliver client advice remotely, are all accelerating the need for digital transformation. CURO has in excess of 4,000 users.