

**FinCalc integrates with Plannr**

COLCHESTER, ENGLAND – January 2023

Financial Planning software provider FinCalc have today announced integration with customer relationship management (CRM) software solution Plannr.

Users can quickly and simply transfer financial and personal data about their clients between the two systems thanks to the two-way integration. Data rekeying is no longer necessary, minimising risk, saving advisers time, and expediting the client review process.

Between FinCalc and Plannr, all necessary customer data and financial modelling information can be transferred seamlessly. Incomes, assets, pensions, savings and investments, liabilities, and expenses will all be pulled through with ease. This two-way link will also sync contributions and the most recent valuations. FinCalc reports can also be automatically uploaded into Plannr.

Advisers can also use the FinCalc Client Portal to onboard new clients or conduct client reviews. As a result, after having their personal and financial information verified by the adviser, this can be uploaded into Plannr.

Jason Wykes, CEO at FinCalc said:

*“In order to save time and ensure that client data is consistently updated across all systems, we want to make sure that Advisers' systems can connect with one another. Our goal is to provide advisers with the best financial tools so they can serve their customers more efficiently, and this integration with Plannr is another step in that direction.”*

Nick Harper, Director at Plannr said:

*“With Plannr we set out to deliver the best Application Programmers Interface (API) available for integrations and FinCalc have shown how cashflow modelling can easily and effectively be integrated with Plannr CRM in the matter of a few weeks.”*

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

<https://www.fincalc.co.uk/news/news/2023/january/2-way-integration-with-plannr-now-available/>



# 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. CEO 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 Plannr**

Plannr is a customer relationship management (CRM) software solution that was launched in 2022.

Contact Information: [www.plannrcrm.com](http://www.plannrcrm.com)

Nick Harper, Director, on 0333 050 2272