

Flexible solutions  
to make life simple.



Our people are still,  
at heart, problem solvers.

We know that technology  
is nothing by itself – it's  
the people behind  
it that matter.




At SSP, we've a history of **looking forward**. Over the last 10 years, we've focused on the future, whether that's developing new technologies, new techniques or new ways to help modernise the insurance and financial advice industry.

We've only been able to achieve this through our understanding of our customers' needs, alongside our innovation in an ever-evolving marketplace.

This innovation is the reason why our customers use our technology, the reason why they've stayed with us, and it's behind how we've helped simplify the industry.

The financial advice industry contains enough challenges. IT shouldn't be one of them. It's the expertise of our people, and our innovative technology, that allow us to streamline our customers' operations in over 50 countries, resolving complex challenges in a global environment.

In the following pages, you'll find a selection of our products and services that provide market-led solutions to resolve your challenges and leave you free to focus on your future.



Laurence Walker  
Chief Executive

# About SSP.

When it comes to numbers in the financial advice industry, we've a few of our own:

- 5,000 users.
- Systems supporting 4 of the top 10 IFA firms.
- Over 750 talented people.
- One purpose: resolving our customers' challenges.

The numbers demonstrate what we do for our customers. We offer unique, joined-up IT solutions that our customers trust. From creating tailored packages to streamline operations, to relieving financial advisers' IT burden. By applying our domain knowledge to our IT solutions, we give customers of all sizes space to focus on their business.

## Staying true to our values.

As a business with thousands of man-years of experience, we've grown into one of the world's leading IT experts.

We've got where we are today because we've attracted the best people, developed the latest technology, and directed it in the right way for the market. Yet we've never lost touch with our roots. For all of our global presence and the volume of business that we support, our people are still, at heart, problem solvers.

This means that, unlike some IT companies, we aren't an overburdened giant set in our ways. Instead, we maintain a simple value of continuous innovation. And we know that technology is nothing by itself – it's the people behind it that matter.

That's why our people are key to our success as much as our customers'. From building IT effectiveness to business performance, they're the reason we stay one step ahead in an ever-changing industry.

## Shaping a better industry.

Now, our people are focused on the future. Devising new technologies. Finding new efficiencies. Modernising the industry through relentless innovation. Just as we can resolve today's challenges, so can we resolve tomorrow's and continue to shape a better industry.



# SSP for Financial Advisers.

At SSP, we understand the financial advice market – its intricacies, complexities and challenges. And because we understand these, we can provide a very real service to financial advisers: our IT solutions make things simple.

As financial advisers head towards full Retail Distribution Review (RDR) compliance by 2012, the primary challenge for our customers is adhering to the new legislation while driving down costs and achieving greater efficiencies. The most effective way to overcome this is to streamline the business's client management systems and the administration of the company. But many financial advisers, while experts in advising other businesses, are often unable to optimise their own. They need a partner with real expertise.

Through this balance of talent and technology, we tailor our offering to your unique needs, running your operations, removing your IT burden and solving your problems. Our solutions are focused on streamlining and automating processes, increasing revenue, assisting planning and service segmentation, enhancing communication, embracing technology and devising a strong, sustainable business strategy. In short, we strengthen our customers' businesses, with the minimum of fuss.

This is where SSP's experience combines to create flexible solutions to make life simple. We complement cutting-edge financial advice software with personal support from a knowledgeable team of industry experts.



On average, our people have over 10 years' industry experience.



# The complex needs of a changing industry.

All eyes in the financial sector are on 2012. The RDR gives consumers more confidence in the products and services they buy. In our industry, it emphasises honesty, trust and firm relationships between client and adviser. The RDR has already had an unprecedented impact, and – as we approach the cut-off point for compliance – financial advisers are racing to find their niche in the new landscape. New challenges – and solutions – are taking shape.

Many advisory firms already have a clear idea of the changes they need to make to their business model in order to thrive in the post-RDR industry. However, concerns are being raised as to how to get the best out of the resulting culture change. The RDR sees a shift in focus from hunting revenue to building relationships. Thus, the effectiveness of IT and client management systems for customer relationship management (CRM) has never been more important.

At the same time, it's hard to forget how crowded the financial advice market is. The struggle to find greater efficiencies and a real competitive advantage is fierce. But what many firms do forget is that efficiencies in this sector are rarely found in gimmicks – they're entrenched in their business operations. Automating actions. Streamlining systems. In summary, working smarter.

Building a successful post-RDR financial advice business needs to be done from the ground up. Creating systems that better service your clients, and processes that can handle more data – and we've brought our company's knowledge, our people's talent and our technology to bear, creating products and services to help you become more efficient and effective in the run-up to 2012 and beyond.



# Flexible solutions to make life simple.



By listening, understanding, developing a tailored IT package, and working flexibly with you, we take complete care of your IT concerns, making complex challenges simple.

Our core offerings in this space are **SSP Swift**, **SSP iSwift** and **SSP iSwift BI**. They share the same platform but provide tailored views based on the usage, whether that's the business, administration, the adviser or ultimately the end client.

**SSP Swift** is everything that the name says. We optimise your client management systems, host, maintain and protect your services and software, and give you remote access on demand. The result: savings in time and costs. As a solution tailored to the size and complexity of your business, **SSP Swift** allows you to forget about IT and focus on financial advice.

**SSP iSwift** is a modular, web-based system offering access and point-of-sale tools. Amongst other things, it enables easier client data gathering and on-demand access to a client's portfolio – reducing the cost of administration while increasing scope for more advisory work by increasing adviser productivity.

**SSP iSwift BI** comprises intelligent solutions to improve management information, service levels and productivity, including 'what-if' analysis, identification of sales trends and an interactive dashboard summary of your business. Crucially, it also helps ensure that your organisation adheres to treating customers fairly (TCF).

These solutions are backed up by our services for financial advisers. From hosting to professional services, SSP provides solutions to help you build stronger, more streamlined systems for more effective relationships and steady revenue growth.



## Simple is better than complex.

The benefits of simplifying your systems are self-evident. Cost savings, time efficiencies and more effective RDR compliance. That's why 4 of the top 10 UK financial advisers trust SSP. By replacing pressure with peace of mind. By cutting costs and finding efficiencies. And by providing flexible solutions to make financial advisers' lives simple.

Browse the industry-commended products and services in this brochure and find out more about our simple, flexible solutions to your challenges. We'd like to invite you for a deeper discussion of how we can help you achieve better performance in a brave new market.

Call one of our financial adviser technology experts

today on **0800 590 705** or visit

[www.ssp-worldwide.com/sspforfinancialadvisers](http://www.ssp-worldwide.com/sspforfinancialadvisers)



Head Office: Fearnley Mill, Dean Clough, Halifax, West Yorkshire, HX3 5AX  
[www.ssp-worldwide.com](http://www.ssp-worldwide.com)

