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For Immediate Release

## Pension transfers simplified for wraps

With approximately 75% of the assets sitting within a wrap destined to fund retirement, of which a third is currently in approved pensions, Novia is pleased to announce it will be introducing The Pension Performance Review Company who can provide advisers with a thorough and efficient system for illustrating and documenting pension transfers.

The specialist report generation software is specially designed to allow advisers to create comprehensive pension transfer suitability reports when recommending wrap providers.

Paul Cadde, managing director, Pension Performance Review Company said, "Novia is the kind of forward-thinking company that advisers should be doing business with and together we are sure we can help to get clients pension investments working harder for them by using the modern technology and range of investment instruments that Novia provide access to".

Martin Broomfield, Head of Marketing, Novia said; "Retirement planning is for many advisers and their customers the most important component of a wrap, however, it is similarly one that can be fraught with logistical and process issues. By combining the benefits of this software system with the flexibility of the Novia SIPP, it opens up the opportunity for the adviser community to confidently tackle pension transfer discussions".

More information about the Pension Performance Review software can be found at [www.pprco.co.uk/novia](http://www.pprco.co.uk/novia) or via your Novia Regional Sales Manager at [www.novia-financial.co.uk](http://www.novia-financial.co.uk) .

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For further information please contact:

Bill Vasilieff, CEO, Novia. [Bill.vasilieff@novia-financial.co.uk](mailto:Bill.vasilieff@novia-financial.co.uk) : 07525 767 276

Martin Broomfield, Head of Marketing, Novia. [martin.broomfield@novia-financial.co.uk](mailto:martin.broomfield@novia-financial.co.uk) : 07525 767 280

Vaughan Andrewartha, Director, Votive : 020 7353 9277  
Derek Pegg, The Pension Performance Review Company, 023 8089 2333.

## **Notes to editors**

About the Pension Performance Review Company:

The Pension Performance Review Company Limited comprises of a team of pension and IT specialists dedicated to bringing financial advisers the best pension transfer system available.

Owned by IFA, Paul Cadde, the business has gone from strength to strength since inception and now provides software to many financial adviser firms throughout the UK. Paul and his financial services team continue to run a successful financial advisory practice, Cadde Financial in Southampton, focussing on providing specialist financial advice to high net worth company directors.

As an IFA, Paul is perfectly placed to ensure the Pension Performance Review company designs software that is easy to use and does exactly what advisers need. His team within Cadde Financial actively use the Pension Performance Review software on a daily basis and help improve the software through detailed ongoing feedback with The Pension Performance Review Company.

This unique arrangement gives the Pension Performance Review Company a great insight into how the Pension Performance Review Process software is used in 'real-world' situations and allows the software developers to tailor and refine every aspect of the systems to ensure they meet the highest standard in usability, functionality, flexibility and compliance.

The Pension Performance Review Company is proud to be completely independent of insurance companies, wrap providers or any other financial institution and as such is perfectly placed to provide a completely unbiased and independent offering to financial advisers.

## **About Novia**

Novia Financial plc launched to market in October 2008 to provide a comprehensive wealth management service or 'full wrap platform' for investment advisers and their clients. Novia provides a transparent pricing structure as well as access to a wide range of product wrappers, an extensive suite of portfolio management tools, and access to an extensive range of investment classes including shares, bonds, traditional authorised funds, ETFs and alternative investments as well as a Cash Facility.

The core operating system is provided by Australian based GBST who have been developing software solutions for fund administration and financial services since 1996, and for wrap solutions since 1999, amassing \$186bn (AU) in assets under management on their systems. The comprehensive suite of portfolio management tools is powered by Financial Express,

who also provide the data for the platform, and the illustrations are provided by Dunstan Thomas.

The Novia team, based in Bath, is led by Bill Vasilieff ex Sales and Marketing director and joint cofounder of Selestia. Novia as an independent proposition has substantial financial backing from a combination of private individuals and corporate organisations. The board is chaired by Sir Anthony Cleaver (former chairman and chief executive of IBM in the UK). Other members include John Beaumont, non executive, who has held a number of non executive roles in major public organisations and several technology startups, Tim Levy (non executive and investor), Chief Executive of Future Capital Partners, David Royds (non executive and investor) Chairman of Matrix group and Bill Vasilieff as CEO. Novia Financial plc is authorised and regulated by the Financial Services Authority.