

13th April 2011

NOVIA LINKS TO PLUM SOFTWARE

Novia, the UK's most sophisticated online wealth management platform, today announces that it will be linking to Plum software. The link with leading independent software house Plum will allow advisers clients to view a snap shot of their portfolio from their adviser's website and enable the adviser to download the information straight into their back office systems. Plum advisers will be able to update for all, or for selected clients and providers with a single enquiry at any time of the day.

There will be two services available, valuation and commission payment details, Advisers can elect to have both modules available or just one, depending on their individual requirements.

Novia already has links with several adviser back office providers and this link with Plum Software, driven by adviser demand, further demonstrates Novia's commitment to continue supporting advisers in their drive for business efficiency.

Richard Denning, Operations Director at Novia said: "In the post RDR world it is more important than ever to provide advisers with a transparent, and efficient business service model, enabling advisers to spend their valuable time advising their clients, rather than being overloaded with admin issues. Plum Software has an excellent reputation, offering a front and back office solution, and we are pleased to be able to provide this service of a fully integrated system to advisers"

Ann Dempster, Managing Director at Plum Software said: "Novia is a fast growing and expanding wealth platform with a reputation for first class technology, we are pleased to be partnering with them and providing advisers with access to their suite of tools. We strive to offer our advisers the best possible service in the market and the Novia link-up is part of that."

Plum Software provides complete solutions for front and back office for the IFA and mortgage broker. The software stores and gives instant access to all or selected client details including scanned documents, correspondence, faxes, emails, voice recordings and diary notes – this is far more efficient than the filing cabinet or Windows folders. When the software is used through the internet, advisers can access all the information from any location without having to invest in expensive systems. By integrating to a large number of providers for a range of information, details need only be entered once.

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Notes to Editors