

Wealthlink – seamless integration saving you time and money



Wealthlink is Intelligent Office's fully integrated submission hub that enables you to electronically submit information direct to the UK's leading providers and platforms. It reduces the need to re-key data and provides a fully 2-way new business submission process, resulting in a more efficient way for you to manage your business and clients.

Our Wealthlink partners

Our partners currently include Aegon, AXA Elevate, Cofunds, Zurich, and 7IM with more partners in the pipeline.

Benefits of using Wealthlink



Streamlined customer applications and platform account setup



Support for transaction history where available



Pre-populate platform applications removing the need to re-key data



Mitigates against the risk of maintaining multiple client records, reducing opportunity for human error. Allows users to build a full event history for each submission, aggregating all information against the individual client and building a full audit history



Seamless integration direct to platform



Saves you time and money – by improving the overall efficiency of your new business submission process and by your reducing operational overheads



Ability to complete trades on platform and receive automated notification direct to Intelligent Office (iO) with re-populated messages from the platform, including event history and documentation where supported



Helps you to build a fuller picture of your client's financial profile – enabling you to provide them with the best advice possible and the ability to meet your client's servicing needs



Reconciliation of platform information to iO – allowing users to aggregate all of their information in one secure location



Support for top ups and switches where available