

ROBO ADVICE FACTSHEET

Cutting-edge support across all areas of streamlined advice

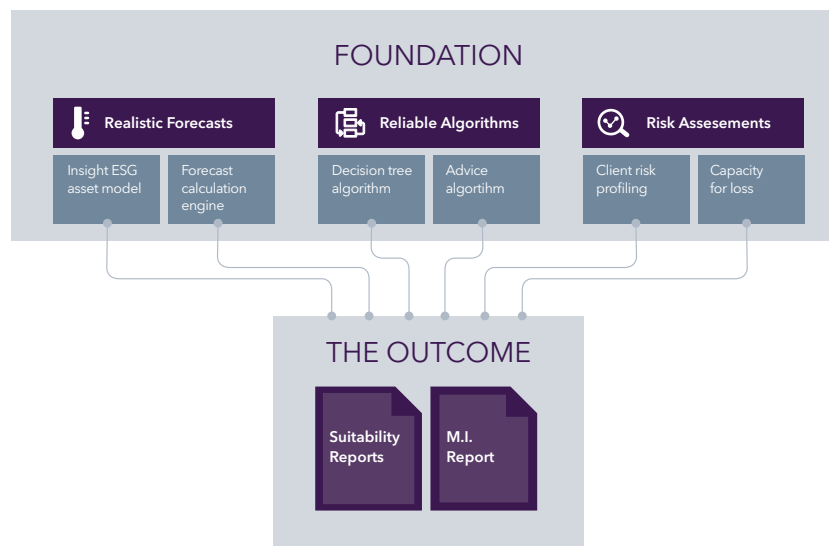
Retail Distribution Review has created an 'advice gap'; the FCA reports that two thirds of all financial products are now sold without professional financial advice. The industry is turning to robo-advice to help close that gap.

There are numerous areas of focused advice that you may choose to implement. EValue is able to support you in the following areas:

- ✓ Investment (ISA / GIA)
- ✓ Protection
- ✓ Pre Retirement
- ✓ Mortgage
- ✓ Pension Consolidation
- ✓ In Retirement
- ✓ DB to DC Transfer
- ✓ At Retirement

WHERE TO START? THE BEST POSSIBLE FOUNDATION THAT IS REALISTIC, RELIABLE AND SUITABLE!

Robo-advice is going to evolve dramatically in the coming years. However, no matter which advice process you choose to focus on first, EValue's Foundation solution offers the best possible starting point for any robo-advice proposition.



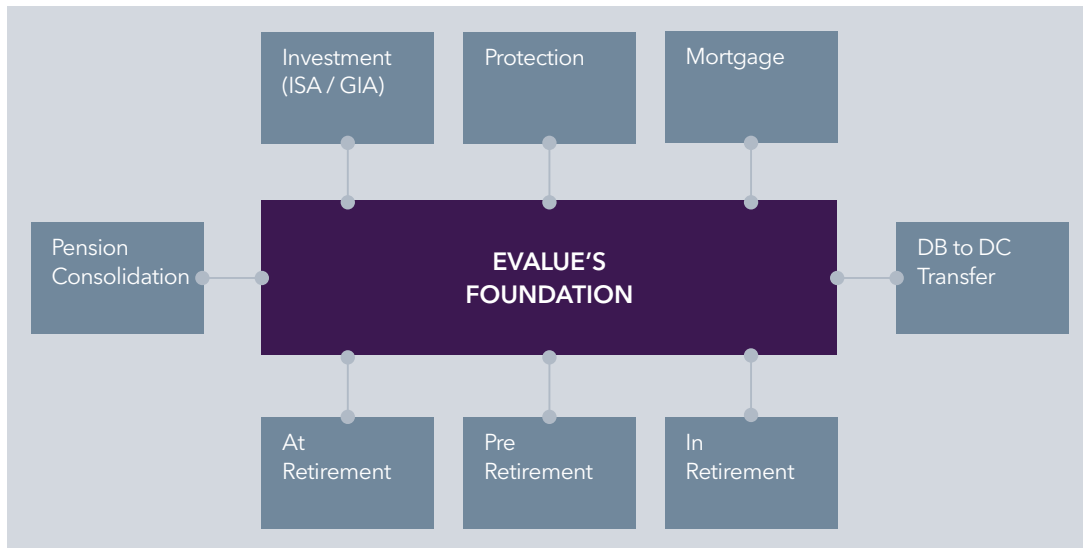
The outcomes of our solution is a recommendation to the consumer in the form of a suitability report, and vital management information (MI) for compliance monitoring and to aid continuous improvement of the consumer experience.

MORE INFORMATION OR REQUEST A DEMONSTRATION?

Visit us: ev.uk Contact us: +44 1635 881180 Email us: contact@ev.uk

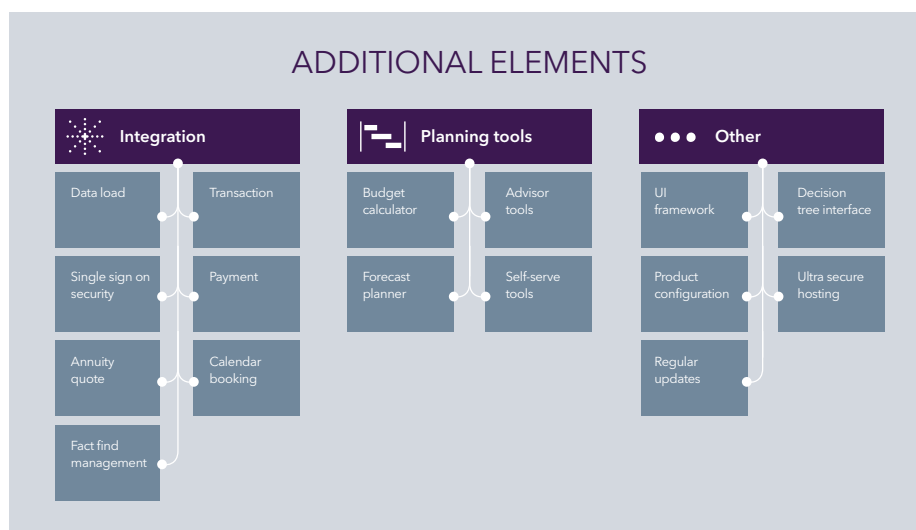
BUILDING ON THE FOUNDATION

Once you've implemented EValue's robo-advice Foundation solution, you can then easily expand upon it into any area of focused advice.



ADDITIONAL ELEMENTS DESIGNED TO FURTHER SUPPORT YOUR SOLUTION

To support the Foundation offering, there are 16 other areas that you may need to consider when implementing a robo-advice solution. EValue currently supports all of these elements either directly or through key integrations.



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