

## CashCalc set to launch TVC/ APTA-compliant module

NEWPORT, WALES – June 01, 2018 – CashCalc is delighted to announce the forthcoming arrival of a standalone TVC/ APTA tool.

The module will be launched prior to the Financial Conduct Authority's (FCA) Transfer Value Comparator (TVC) and Appropriate Pension Transfer Analysis (APTA) regulations becoming effective from 1<sup>st</sup> October 2018. It will be a standalone subscription-based tool.

Not only will the module retain CashCalc's renowned intuitive and straightforward interface, it will also come at a very affordable price.

Users will be able to sign up to the TVC/ APTA tool on its own, or as part of their regular CashCalc subscription. This will allow users of other financial tools such as 'Voyant' and 'Truth' the ability to use an FCA-compliant tool for TVC and APTA, while continuing to do their cash flow planning with their existing provider.

CashCalc will, in a ground-breaking move, make available its API (application programming interface) to allow users of other cash flow tools to sync their CashCalc data with those tools.

The module will not only help financial planners meet their clients' objectives, but at the same time help them achieve the core aims of the new regulations. It also serves as another example of the role CashCalc is playing in the evolution of financial planning.

The tool comes as a result of extensive consultation between CashCalc director and Chartered Financial Planner Ray Adams and financial advice specialist Rory Percival ([www.rorypercival.co.uk](http://www.rorypercival.co.uk)). Rory brings to the table a deep knowledge of regulation and how the FCA operates having spent 10 years at the regulator. He now runs his own training and consultancy firm.

**Ray Adams, CashCalc director and Chartered Financial Planner:** "With TVC and APTA replacing TVAS, there is now an opportunity to provide financial advisers with a fully compliant yet affordable and simple-to-use tool.

"A key element of this will be that it is available to all planners, no matter who they choose as their cash flow planning software provider. I fully believe that it's the responsibility of software providers to make information available to each other if it's in the interests of our users and their clients.

"The focused nature of this new guidance has allowed us, alongside Rory, to begin to develop another fantastic tool."

**Rory Percival, of Rory Percival Training and Consultancy:** "I am looking forward to working with CashCalc on its TVC/ APTA tool. CashCalc is particularly well-placed to create a user-friendly and client-friendly tool to help advisers meet the forthcoming FCA requirements for DB transfers."

### **About CashCalc**

CashCalc ([www.cashcalc.co.uk](http://www.cashcalc.co.uk)) offers market leading cashflow planning software that enables financial advisers to create detailed and precise financial plans without any of the unnecessary complexity. Our mission is to make the financial planning process simpler, more visual and more productive with incredibly powerful and intuitive tools. We believe in simple inputs, complex calculations, powerful outputs. CashCalc is based in Newport, Wales and serves over 8,000 users in the UK alone, with further financial advisers based in 5 of the 7 continents. Developed and run by a team of practising Chartered Financial Planners, the company has growing beyond recognition since its launch in May 2014:

Total number of registered users:	<b>8,342</b>
Total number of clients entered:	<b>91,770</b>
Average case size	<b>£526,226</b>
Total funds under calculation:	<b>£48.29bn</b>
Total number of forecast created:	<b>490,531</b>
Total number of Data Capture Forms completed:	<b>16,044</b>
Total number of tools available:	<b>26</b>

*\*Figures correct as of May 31, 2018*

### **Contact**

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