

JOINT PRESS RELEASE

CashCalc and Creative Technologies integration

NEWPORT, WALES – March 9, 2018 – CashCalc are delighted to announce it has partnered with Creative Technologies to help make the financial planning process even more efficient. The partnership will see CashCalc integrate with Enable, the specialist back office developed by Creative Technologies, and will be a welcomed addition for advisers who use both pieces of software.

The integration will allow financial advisers to seamlessly push client information from their Enable account into their CashCalc account. This will reduce the amount of time spent re-keying data while also helping improve data accuracy; the information will only need to be keyed once.

The client information which can be pushed from Enable into CashCalc includes:

- Client details (i.e. name and date of birth)
- Savings & Investments
- Pensions
- Assets & Liabilities
- Spouse's information

Ray Adams, Director of CashCalc and Chartered Financial Planner, said: "As the leading cashflow planning provider in the UK*, it is important that we continuously seek ways to make the financial planning process even more efficient. Our open API is beginning to make this happen and we are delighted to welcome Creative Technologies to our integration suite."

Keith Hare, Group Director for Creative Technologies, said: "Integration is at the heart of Creative Technologies software, and the CashCalc partnership adds to our long list of seamless integrations with our CRM, Platform, Client Portal and other leading financial technology systems. We are delighted to partner with Ray and his team and look forward to supporting CashCalc and our mutual clients."

Brian Potter, Director of Aspect 8 IFA and Chartered Financial Planner, said: "Creative Technologies have done it again! Within Aspect 8 we drive a culture of continuous learning to help build long lasting relationships with our clients. This is only achieved by seeing the full picture of our clients' financial status. Enable already has strong functionality to achieve this, but now the CashCalc integration has arrived, it allows us to drive this culture even further."

The one-way integration can be set-up via the adviser's Enable account. Once this has been activated, they will then be able to push the information they want into CashCalc. The whole process will only take a matter of moments.

To find out more information on the CashCalc integration with Enable, visit <https://cashcalc.co.uk/blog/2018/03/08/integrate-with-enable>. Or to set up the integration, visit www.ctsuite.com.

*according to the independent report *Adviser Market: Fintech and Digital (2018)* by Platform.

About CashCalc

CashCalc (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 nearly 7,500 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 users:	2,853 in 2016	7,552 in 2018
Total number of clients entered:	19,113 in 2016	86,659 in 2018
Total number of forecast created:	43,824 in 2016	432,972 in 2018
Total number of Data Capture Forms completed:	571 in 2016	12,147 in 2018
Total number of tools available:	22 in 2016	26 in 2018

About Creative Technologies

Creative Technologies (www.ctoneworld.com) offers a market-leading range of financial software, consultancy and training services. We meet the diverse needs of our clients in their respective markets by combining innovative software with our industry expertise to provide solutions across the financial services industry. Our mission is to bring together all the jigsaw pieces in an otherwise fragmented industry. Our best-in-class technology solutions, discretionary platform and support services provide a competitive advantage to over 120 leading global and national firms. Creative Technologies is based in West Sussex, England and is part of the Benchmark Capital group (www.benchmarkcapital.co.uk).

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