

Touchstone Platform

Touchstone Platform is designed for Platform and Wrap providers who offer investment solutions to the UK intermediary market. It also informs life companies and fund managers how platforms are affecting their traditional 'direct to provider' business model. With 76 major life companies, fund managers and platforms all supplying data, Touchstone Platform gives you the most detailed insight into IFA platform activity available in the UK today.

Individual new business profiles are available on over 12,000 IFA firms, allowing you to view their 'on' and 'off' platform sales across unit trusts, ISAs, investment bonds and pensions.

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| <ul style="list-style-type: none"> • How quickly are IFAs adopting platforms ahead of the RDR's introduction in 2013? • Ensure your company is considered before they make their choice • View your own v total share of each IFA's platform business • Identify IFAs still to choose a platform provider • Isolate networks and drill down to view their underlying appointed rep firms | <ul style="list-style-type: none"> • Overlay your own account manager panels • View firms and their office outlets across the UK • Drill down to view 35,000 plus registered individuals (RIs) • View each RI's FSA permissions, current role in the firm, and their 9-year professional history • Updated quarterly to help you keep in touch with your market |
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Who should use Touchstone Platform?

Distribution Strategy

- Size the market; number of IFAs using platforms; new business value; adviser numbers; geographical spread.
- Identify the IFAs you really want to partner with.
- Create service strategies; key accounts; regional; telephone etc.
- Segment IFAs into non- platform user ; single platform user; multi-platform etc.
- Identify where to put account managers on the ground, and how many IFAs they can service given geographical constraints.
- Set new business targets based on real panel potential.

Account Managers and Telephone Support Teams

- Customise your service proposition to match each IFA's experience of platforms, and the product wrappers they need to service their clients.
- Segment your panel into intermediary, stockbroker, discretionary fund manager, etc.
- Use the MI to prepare appointments for maximum impact.
- Identify how well your IFAs really support your platform.
- Track if their support is increasing or decreasing.

Sales Managers

- View the full potential of each account manager's panel.
- Balance the panels so the team have equal potential.
- Appraise how well they penetrate their panels every quarter.

Marketing

- Customise your direct marketing campaigns for maximum effect.
- Identify where to host road shows and who to invite along.
- Direct your sales teams to opportunities, before they pass them by.

Market Research

- Unparalleled insight into your market place.
- Macro and Micro analysis tools instantly available.
- Support your company stakeholders with key marketing metrics.

Touchstone Platform

Touchstone Software

- Web or Desktop versions available.
- Easy to use but powerful interface.
- Quick reports to get key info – fast.
- Advanced features for more adventurous and demanding users.
- Customise, save and retrieve your favourite reports.
- Google maps with proprietary Touchstone view.
- Excel style filters and cut/paste features to refine your queries.
- Instantly create PDFs and send info round your business.

Touchstone Data

- Data updated once every quarter.
- Sophisticated quality control processes mean high confidence levels.
- Full audits on your data quality provided every quarter.
- Full support to help your IT team deliver your data.
- Investor age and sex details.
- Feed data directly into your own systems.

Touchstone Support

- Full training with certification available.
- Your own dedicated and highly skilled account manager.

Touchstone Platform tracks 'on' and 'off' platform sales across:

Investment

- Unit Trusts
- ISAs
- Offshore Bond
- Distribution Bond
- Unit Linked Bond
- With Profit Bond

Individual Pension

- Personal Pension
- SIPP

Group Pension

- GPP
- GMP
- AVC GMP
- SSAS
- SASS TIB

At Retirement

- Pension Annuity
- Income Drawdown