

Success Story

Dunstan Thomas Imago Illustrations & Administration deployed at Close Brothers

The retirement solutions specialist Dunstan Thomas is deploying both its Imago Administration and Imago Illustrations into Close Brothers Asset Management, to support Close Brothers' SIPP book illustrations and back office administration initially.

Imago Illustrations will provide SIPP illustrations while Imago Administration will provide comprehensive SIPP administration capability. Imago Illustrations is being fully integrated into Close Brothers' existing front office system Iress Pulse. Integration and testing will be completed within the next month, ahead of official go live next April.

Dunstan Thomas Imago interface will enable automated and scheduled fund feeds, asset splits and fee information. Imago Administration will support news business and servicing events, funding statements, incoming transactions, outgoing transactions, valuations and scheme questionnaires, amongst other functionality.

Chris Read, group chief executive, Dunstan Thomas, explains:

"It is great to be working with Close Brothers on this Imago Illustrations and Imago Administration implementation and to be completing deep-level integration with Iress Pulse for the first time. The open architected nature of Imago puts us in a great position to help providers and platforms add functionality and improve customer engagement without the upheaval of throwing out legacy systems."

Richard Curry, chief operations officer, Close Brothers Asset Management, added:

"High quality service is central to our business and one of the key reasons why demand for our SIPP is going from strength to strength. Working with Dunstan Thomas Imago will help us build greater administrative efficiency and functionality, which will ultimately improve the experience we offer both clients and advisers."

