

# Success Story

## Dunstan Thomas powers efficiency drive at Mattioli Woods

The retirement solutions specialist and outsourced IT partner Dunstan Thomas, is providing integration expertise and know-how to deliver a series of major efficiencies at Mattioli Woods.

Dunstan Thomas has already delivered two pieces of automation: the first automatically updates expiry dates of building insurance cover for Mattioli Woods SIPP and SSAS members holding commercial property. Before implementation of this change, all properties' insurance policy details had to be updated manually at renewal time.

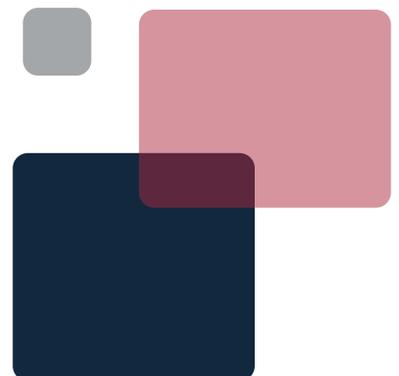
Dunstan Thomas has also enabled automatic storage of all commercial properties' Energy Performance Certificates, within relevant SIPP-held property folders - all administered by Mattioli Woods' own pensions administration platform MWeb.

**Dunstan Thomas  
delivers key  
efficiencies and helps  
unlock capacity for  
innovation**

### Technology and Integration Director, Mattioli Woods, said:

*"It doesn't end there. Over the next few months Dunstan Thomas will enable a significant number of new efficiencies. Their work will lift some of the more mundane, but nevertheless critical, manual tasks off our client relationship managers - freeing them up to add more value to clients."*

Dunstan Thomas is completing vital integration of parts of Pershing's trading, clearing, settlement and custody platform Nexus with MWeb. Once complete, the Nexus-MWeb integration will eliminate the need for manual rekeying of new member details and existing member updates. It will also mean that digital trade instructions posted in MWeb by members' customer relationship manager, will be automatically re-laid to Nexus for transacting.



**Technology and Integration Director, Mattioli Woods, again:**

*"Dunstan Thomas' Pershing-MWeb integration activity is particularly valuable for eliminating data input errors which tend to happen when manual rekeying of customer data is required into several different systems. Consequently, our data integrity will be higher which stands us in good stead for GDPR go live on 25th May."*

Dunstan Thomas is also enabling automatic loading and applying of the HMRC's annual residency file relevant to SIPP and SSAS members. This enables members' differing pensions tax relief percentages on pensions contributions (based on residency status) to be applied to member documentation required for Contribution Tax Claims, ahead of download from MWeb.

Dunstan Thomas is further enhancing MWeb by delivering automatic calculation of percentage and value amounts of each fund split, as soon as new pension contributions have been received and/or paid out and whenever portfolio values change.

Dunstan Thomas is also working on functionality to enable automatic reconciliation of members' bank accounts. Another piece of work by Dunstan Thomas will enable automatic generation and storage of pensions savings statements, contribution schedules, contribution payments records and other statutorily-required pensions documentation.

**Bryan Beeston, Business Development Director at Dunstan Thomas, added:**

*"Dunstan Thomas is enabling both change and innovation here - helping Mattioli Woods to realise vital efficiencies at a time when the administrative and regulatory burdens of pensions, wealth management and employee benefits services providers are increasing significantly."*