

Success Story

Third Financial Customer Profile

Third Financial is one of the most highly regarded Investment Platform and Wealth Management Software providers in the UK. Established in 2007 as a wealth management software business, Third entered the Investment Platform market in 2016 and has experienced rapid growth. Over £60bn of assets are now administered using Third's technology. The company is headquartered in London and employs over 90 staff.

Third offers firms the ability to be in full control of their proposition, branding, investment solutions, and fees. They serve some of the fastest growing discretionary wealth managers, multi-family offices and financial advice firms in the UK. Those firms include Luna Investment Management, McInroy & Wood, Foster Denovo, Kingswood, and Barker Poland.

Challenge

Third needed a cost effective and quick-to-market solution for regulatory disclosure documents for all product wrappers as adviser firms ramp up business on their investment platform.

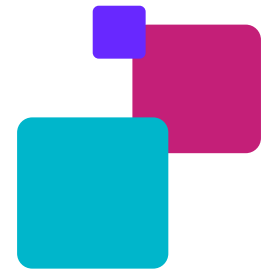
The solution needed to allow Third to control user journeys and customer experience, allowing full white labelling, customisation and configuration for both COBs and MiFID disclosure documents. Dunstan Thomas was able to deliver a solution using its hosted Imago Illustrations Bureau service in just a few weeks.

As business volumes increased Third Financial implemented a dedicated instance of the Imago Illustrations software that would best provide the scale, configurability and flexibility needed to support the company's ambitious growth plans. Today, Imago Illustrations provides a fully integrated 'black box' solution that delivers fully featured, on demand, documents directly to users of the company's digital front end.

Why did Third Financial choose Dunstan Thomas?

With over three decades working as a leading provider of pensions technology, illustrations software, customer and adviser portals and tools, Dunstan Thomas has repeatedly demonstrated the ability to quickly build strong, flexible, and collaborative working relationships, making Dunstan Thomas an attractive partner for Third Financial. This experience has created a vast wealth of industry knowledge, enabling solutions to be matched uniquely to a customer's requirements.

Third Financial chose Dunstan Thomas' market leading Imago Illustrations software as it provided the best way of augmenting the existing product offering without having to worry about the complexity of building and maintaining a proprietary solution. This enabled Third Financial to rapidly deliver a cutting-edge solution to its intermediary customers, including comprehensive and user-friendly user journeys, incorporating Self Invested Personal Pensions (SIPP), General Investment Accounts (GIA), Individual Savings Accounts (ISA) and Junior Individual Savings Accounts (JISA) products and a full range of underlying investment funds.



Ricky Ali, Commercial Director, Third Financial said

"We needed a system that gave us the flexibility and scalability to support our users with great customer friendly documentation, and Dunstan Thomas' Imago illustration solution gives us that. We consider the software to be best of breed and Dunstan Thomas' expertise in this field and their focus on delivery has been evident throughout the engagement."

Solution & Results

The totally integrated illustrations and disclosure solution has been implemented with Imago Illustrations architecture, creating a modular solution that delivers the greatest flexibility and performance providing a seamless, straight through processing experience. The Imago Illustrations user interface can also be used as a sand box environment to produce illustrations with a minimum amount of keying. Third Financial is taking on its own deployment of Imago Illustrations, putting the firm in control of delivery and configuration. The deployment makes use of Third Financial's digital front end, utilising the Imago Illustrations calculation engine to perform calculations behind the scenes. The comprehensive illustration data and white labelled documents are returned electronically to the intermediary and their clients respectively.

Imago Illustrations can provide any number of white labelled product sets for Third Financial with the flexibility to configure product features and charges.

Andrew Martin, Chief Commercial Officer at Dunstan Thomas said

"We are delighted to have been selected by Third Financial as its supplier of illustration software. The list of Imago Illustrations customers goes from strength to strength and reflects its unrivalled reputation in the market. Third Financial is an exciting company to partner with and we look forward to supporting its ambitious growth plans over the coming years."

