

The AI-powered digital advice platform powering trusted advice at scale

What is a digital advice platform?

The world is constantly evolving; the advice process should too.

To keep up with client expectations, firms need reliable, intelligent technology. Current solutions are disconnected, siloed and require multiple logins. This means more time jumping between screens and a high risk of error as information is manually added.

Tailored to the customer's needs through a modular infrastructure, the Dynamic Planner platform digitalises the entire advice journey end to end. It removes re-keying, consolidates fragmented systems, and provides a Consumer Duty ready framework that enables firms to **deliver high quality advice efficiently, consistently and profitably.**

Dynamic Planner

Dynamic Planner is the UK's most widely adopted digital advice platform, serving over 40% of firms across the country. When adopted, customers can achieve:

Full coverage, automating every step of the advice process, from AI-assisted meetings, to cash flow plans, suitability and ongoing service with our white-labelled mobile app, Tram.

Seamless integrations and our Open API hook your existing workflows into Dynamic Planner, automating valuations and ensuring all client data is up to date and can be pulled and pushed to and from your other systems. Power your own bespoke apps with our models.

Data, oversight and compliance are built in, ensuring all advice processes fit your firm's policy, proposition and Consumer Duty requirements with quality MI and data driven insight you can trust.



Learn more
Scan the QR code
to find out more





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