Twenty7tec

Technology that makes advice flow.

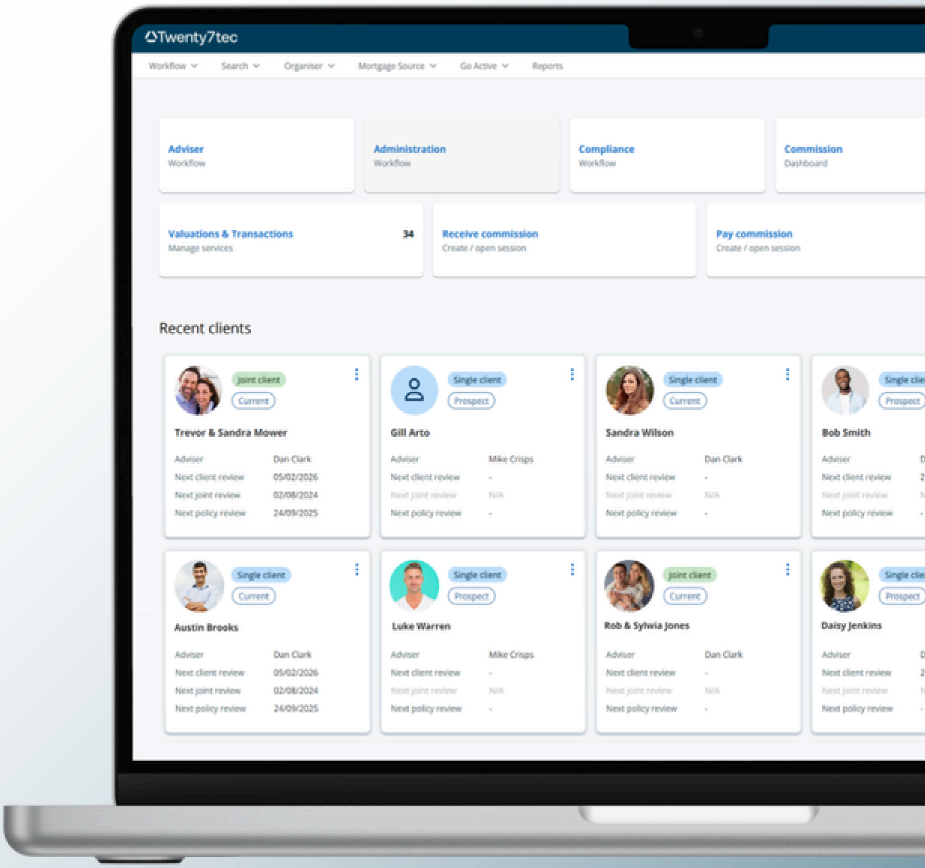
One connected ecosystem for modern wealth advice firms

— Deliver consistent advice

— Connect your technology

— Build compliance into every workflow

— Create exceptional client experiences



Technology should adapt to your business. Not the other way around.

Most advice firms still operate across disconnected systems.

Client onboarding sits in one platform	Compliance lives somewhere else.	Provider information is spread across multiple systems.	Reporting often requires manual effort.	Client journeys become fragmented.

The result is operational friction, duplicated effort and limited visibility.

At Twenty7tec, we believe firms should define how they operate.

Technology should adapt to them.

That belief has shaped a configurable ecosystem that connects every stage of the advice journey, helping firms deliver consistent, compliant and scalable advice.

Your Wealth Technology Partners

Technology alone is not enough.

Our teams work alongside our customers to help implement, evolve and optimise their technology environment, ensuring it continues to support their ambitions as they grow.

James Tucker

Chief Executive Officer

James leads Twenty7tec's vision of creating technology that makes advice flow.

Adam Newman

Head of Sales

Adam works closely with leading advice firms to design technology environments that support better outcomes for advisers and clients alike.

James Bush

National Sales Manager

Bringing first-hand experience from an IFA practice, James understands how technology can support advisers in delivering better client outcomes.

Your Configurable Digital Command Centre

ADVICE is the configurable, API-first digital command centre that connects every stage of your client's financial journey - bringing together wealth, mortgages and protections advice.

In a single connected ecosystem, ADVICE enables you to manage the entire customer lifecycle, helping firms deliver consistent, efficient and personalised advice.

Deliver the right advice, your way

Customise end-to-end workflows for ongoing client management, from portfolio analysis to annual reviews, rebalancing and long-term client servicing.

Build Compliance into Every Case

Embed ID & Verification, Anti-Money Laundering, Consumer Duty and audit trails directly into workflows - ensuring every action is tracked, defensible and aligned to regulatory expectations.

Integrate The Tools Your Advisers Rely On

Through our open API, connect your preferred third-party services - including the latest AI enabled tooling - keeping data and workflows connected from enquiry to completion.

Control Complex Revenue and Commission

Automate the tracking, reconciliation and distribution of client fees and provider commissions - reducing manual effort and protecting revenue.

Key capabilities

Designed Around Modern Wealth Advice

01 End-to-end workflow configuration

Configure onboarding, portfolio setup, review cycles and servicing workflows around your advice model.

02 Portfolio Visibility and Fund Data Integration

Access live fund pricing, valuations and performance data directly within client records - supporting informed, timely advice.

03 Policy Connection and Tracking

Link client policies to providers to monitor changes between reviews - ensuring advisers always have a complete and current view.

04 Automated Review Management

Schedule and trigger client reviews based on service levels - ensuring consistent engagement and regulatory alignment.

05 Management Reporting and Oversight

Provide firm-wide visibility of adviser activity, compliance status and business performance without additional manual oversight.

Client success story

Delivering Greater Efficiency Through a Connected Advice Journey

Deep Blue - powered by ADVICE, Twenty7tec's Digital Command Centre

Deep Blue wanted to reduce administration, strengthen compliance and improve visibility across onboarding, reporting, commission management and client servicing. By implementing ADVICE as its configurable Digital Command Centre, the firm has streamlined key processes and created a more connected way of working.

The challenge

As the business grew, disconnected systems, manual AML checks, spreadsheet-based reporting and time-consuming commission reconciliation created unnecessary administration and made it harder to access the information advisers needed quickly.

The solution

Using configurable workflows and integrated third-party services within ADVICE, Deep Blue transformed the way it operates by:

— Automating onboarding and Letters of Authority

— Integrating SmartSearch AML checks
Accessing live policy valuations through provider integrations

— Automating commission reconciliation

— Replacing manual reporting with custom reports generated directly from ADVICE

1-2 hours saved weekly through integrated AML checks and streamlined onboarding

3-4 hours saved weekly with instant access to live policy valuations

5+ hours saved weekly by automating operational and compliance reporting

In total: **10+ hours** reclaimed weekly through automation across onboarding, valuations and reporting

We are profoundly more efficient and compliant than we ever were. Being able to review client records and email trails quickly, alongside automatically generating custom reports, ensures we can deliver the best possible client experience without the added workload.

Katrina Francis **Deep Blue**

Open integrations

Connect The Technology You Already Use

Advice firms like yours rely on specialist technology. ADVICE is designed to bring those technologies together.

Through our API-first architecture, firms can connect platforms, providers, compliance solutions and specialist tools into one connected advice environment.

Investment platforms & providers

Bringing valuations, policy data and commission information directly into ADVICE

Quilter
Transact
Nucleus
Aegon Platform
Fidelity
Abrdn
Plus more

Portfolio & Investment Management

Supporting portfolio visibility and investment oversight.

Brooks Macdonald
Parmenion
Platform One
Novia
Standard Life
Plus more

Research & Investment Intelligence

Providing advisers with access to research, due diligence and investment analytics.

FE Analytics
FE Fund Feed
Morningstar Fund Feed
Defaqto Engage
Mabel (future)
Plus more

Financial Planning & Cashflow Modelling

Supporting long-term planning and client advice.

FinCalc
Mabel
4Admin
iPipeline Solution Builder
PlannerPal
Plus more

Compliance & Verification

Embedding governance directly into adviser workflows.

SmartSearch AML
Didit IDV
Legalesign
Synaptic Webline
UnderwriteMe
Plus more

Commission & Revenue Management

Automating commission reconciliation and revenue oversight.

Aviva Wrap
Royal London
Legal & General
LV=
Zurich
Plus more

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SCAN TO EXPLORE ADVICE