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PTFS TO SUPPORT LAUNCH OF 'AssuranceKeeper' SERVICE

Personal Touch Financial Services (PTFS), one of the leading mortgage adviser networks, has teamed up with technology pioneer eKeeper to support the launch of a new 'AssuranceKeeper' service.

Aimed at providing directly authorised advisers with market leading protection policies and remuneration options, the new AssuranceKeeper life assurance quotes service will form part of the popular MortgageKeeper CRM system.

Advisers using the new AssuranceKeeper service will have access to an automated quote facility on life, CIC (critical illness) & PHI products and an automated e-document service providing illustrations, comparisons and key features documents. Personal Touch will support AssuranceKeeper by offering its directly authorised adviser users exclusive access to its protection products, with all the associated discounts and special remuneration deals available.

The new service goes live on July 1st and although the normal license fee for AssuranceKeeper will be £12.00 per month (+VAT), any advisers signing up to the new service before the end of 2014 will be able to use it free of charge.

David Carrington, marketing director of Personal Touch Financial Services, explains:

"This is a very exciting partnership for us, representing a major step into an additional new distribution channel for our protection products with the directly authorised adviser sector. AssuranceKeeper will benefit from being able to give access to our very competitive protection panel products to DA users on the same terms as our own network members".

Rick Watkin, managing director of parent company eKeeper, comments:

“Combining our technology skills, which have built popular CRM systems in the mortgage and commercial insurance sector, with the impressive range of protection products which PTFS can offer, is a really good match. Not only will our existing users be able to access some very competitive new products but also we hope to attract many new advisers to the AssuranceKeeper service, particularly with the benefit of the free license fee offer to encourage take-up.”

Watkin continues: “Over 2200 IFAs and brokers use one of our three CRM systems. The MortgageKeeper CRM alone has over 800 FCA directly authorised individual users and between them they process over 40,000 mortgages per annum – equivalent to about 5% of the UK marketplace. Although most already have agencies with many of the Life providers, very few currently receive the enhanced remuneration rates that we will now have available through PTFS”.

ENDS

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Notes To Editors

About Personal Touch Financial Services

Personal Touch Financial Services is a privately-owned professional adviser network. Established in 1994, the Company is authorised and regulated by the Financial Conduct Authority (FCA). Personal Touch Financial Services provides business, technical and regulatory support to a community of highly-qualified member firms, with a focus on the mortgage and protection sector.

Personal Touch is committed to running a consumer-focused organisation with professional standards and service quality at the core of this. In its investment and pensions operation, Personal Touch operates a broad-based, restricted advice proposition with professionally qualified advisers supported by dedicated bespoke technology, compliance and business development resources.

2014 is the 20th anniversary of the network which is now established as one of the leading mortgage distributors in the UK marketplace.

EKeeper Group

EKeeper Group Ltd is a privately owned software and services business. MortgageKeeper launched in 2004 and provides fully web-based software applications supporting both sales and administration support for the Financial Services industry – specifically targeting the Mortgage, Protection and General Insurance marketplace.

The core of the product is built around a powerful and flexible CRM system that can be configured to provide the work flow that individual companies require whilst allowing the principals to control activity and functionality.

The company's software has been further developed in recent years to the Commercial Broker market, enhanced by its exclusive supply of its CommercialKeeper application to members of the NACFB. The applications also include support for the IFA marketplace, enhanced by the acquisition of the Senro system from Solution 4. The product range also includes banking, lending and peer-to-peer systems.