

September 2013

eValue is to provide an innovative portfolio optimisation solution to outsourced paraplanning provider, The Timebank

- *Offers a consistent approach for both platform and non-platform assets*
- *Can support the outputs from different risk profile questionnaires*
- *Improves efficiency and optimises returns for clients on both new and existing investments*
- *Comprehensively addresses the FCA's concern about ensuring the suitability of investment recommendations.*

eValue is delighted to announce that it will be providing Portfolio Analyser, part of its Advisa Centa suite of tools, to support The Timebank Paraplanners with providing client portfolio review recommendations. **Damian Davies, director of The Timebank** said *"This solution enables our Paraplanners to achieve considerable efficiencies as it brings together product and fund review in one place and offers the ability to optimise on and off platform assets to give the highest potential return for the selected risk profile."*

Joanna Hall, Sales and Marketing Director at eValue explains *"Portfolio Analyser enables The Timebank's paraplanners to review and regularly rebalance compliantly and efficiently existing portfolios of products and funds, ensuring the best possible solution for their adviser clients. The result is a bespoke portfolio that meets the client's specific needs and risk profile, delivering the best possible potential outcome."*

Portfolio Analyser will become an integral part of The Timebank's paraplanning process.

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For further information:

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Note to editors:

About eValue

eValue www.evaluefe.com provides market leading financial planning tools that enable advisers and consumers to understand the potential risk and return from different investment choices. Our tools and solutions are designed on a single piece of software. This means that they can be used either as a standalone or an integrated as part of a multi-channel offering to enhance the consumer/adviser experience. Over 80 per cent of all UK financial services institutions and more than half of the adviser market have access to eValue's tools and solutions. Our heritage originates from Towers Watson, a leading global risk management and HR consulting group. The business now operates as an associate company of FE (Financial Express Holdings).

Advisa Centa www.advisacent.com is a subsidiary of eValue and comprises a powerful suite of easy-to-use and intuitive tools designed to support the financial advisory process, from engaging consumers on the need for advice to analysing individual portfolios and products with a view to enabling full optimisation of existing assets. Regular upgrading of tools on the basis of emerging trends and customer feedback, means that they are continually refreshed. Through its highly configurable offering, Advisa Centa also enables advisers to quantify and demonstrate their added value to clients.

About Timebank

The Timebank www.thetimebank.co.uk is an outsourced paraplanning organisation, supporting IFAs and financial planners. Established in 2003, The Timebank is the most established Paraplanning business in the UK and delivers consistency in support by employing their full team of 22 people, ensuring their Paraplanners are technically excellent by being Chartered or CFP and acting as a critical friend to their clients. The business has been built on understanding that Paraplanning helps firms deliver their service proposition quickly and effectively. From this, The Timebank has developed additional services, including:

- Timebank Bespoke, for firms who know what they want and need additional Paraplanning resource to assimilate into their business,
- Timebank Express, for firms who want support but don't need a bespoke relationship,
- Timebank Migrate, for firms who want to help their clients benefit from their new service propositions quickly and effectively
- Timebank Research, for firms who want an independent view on the available products, services and relationships that their clients may require.