



ORIGO

Introduction to the Origo Transfer Services

Connecting the financial services
industry for the benefit of everyone

*Data Classification: Public

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Origo Transfer Service

Thanks to our Transfer Service, pension and investment transfers now glide through quickly and smoothly – completely transforming the customer experience. Processes that used to involve weeks of clunky manual admin and forms sent through the post can now take place electronically.

The Only Complete Transfer Service



Transfer times **reduced by 80%**, with many less than one hour.



Handling over **one million transfers** each year.



Over **£50bn** of customers assets transferred annually.

The UK Market Leader

Launched in 2008, the Origo Transfer Service was the first of its kind available in the UK. It is still the market leader and the only complete transfer service, enabling secure and speedy transfers of pensions, GIAs and ISAs. It allows providers and platforms to save both time and money while delivering better and faster outcomes for their customers.

Over
140
brands

To find out more, visit: **origo.com**

Origo Transfer Service

How our Transfer Service works

The Origo Transfer Service (OTS) ensures smoother communications throughout the process, by providing each transferring party with detailed contact points and real-time messaging.

As the first of its kind, OTS reshaped the transfer market, making an immediate reduction on transfer times, from months to minutes.

Speed

Transfers can be completed in minutes.

Collaboration

We have the largest transfers network available, which has enabled over 140 brands to transfer more than £270 billion safely and securely.

Back office integration

Automatically send and receive information from your back office and feed that information directly into our Transfer Service without the need for re-keying any data.

Management Information

You can get in-depth information when you need it – helping you to manage your processes and workloads effectively.

Helpdesk

Origo Transfer Service has its very own dedicated support function and helpdesk that you can phone or email with your queries.

To find out more, visit: **origo.com**

Origo Transfer Index

Average ceding performance in last 12 months

The table below lists, in the 12-month period from January 1, 2021 to December 31, 2021, the average ceding performance by organisation across all transfers successfully ceded via the Origo Transfer Service. Please note that for any product or transfer that an organisation deems to be not within the scope of the Origo Transfer Service, customers may have a different experience.

	OVERALL	"SIMPLER" TRANSFERS	
Ceding Organisation	Average ceding performance (days)	Average ceding performance (days)	Proportion of Total Transfers
Advance by Embark Platform	13.0	10.6	0.2%
Aegon	10.3	8.2	88.0%
Aviva	11.0	8.5	92.8%
B&CE Financial Services Ltd	28.1	27.8	93.9%
Canada Life	8.3	5.6	79.6%
Abrdn Elevate	15.6	14.0	71.8%
Fidelity	8.0	7.4	95.4%
Forester Life	7.3	6.0	88.3%
Hargreaves Lansdown	29.6	28.9	96.4%
Hornbuckle (Embark Group)	10.7	9.4	88.5%
InvestAcc	12.9	3.9	67.9%
Legal & General	8.5	6.0	90.8%
LV=	25.1	13.8	29.7%
MetLife	6.9	6.2	96.4%
National Employment Savings Trust	20.1	18.1	91.6%

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	OVERALL	"SIMPLER" TRANSFERS	
Ceding Organisation	Average ceding performance (days)	Average ceding performance (days)	Proportion of Total Transfers
NFU Mutual	5.2	4.7	96.0%
Novia	14.3	10.1	46.3%
Parmenion Capital Partners	12.5	12.2	95.0%
PensionBee	9.8	9.3	63.9%
Phoenix Group	9.7	7.1	88.2%
Pru by M&G	17.2	15.9	93.1%
Quilter	29.8	23.0	26.4%
ReAssure	10.8	9.5	94.6%
Royal London	14.9	13.9	93.8%
Standard Life	10.6	7.3	85.3%
Vanguard	18.7	16.3	77.3%
Wealthtime	9.2	7.3	82.7%
Zurich Group	8.0	7.3	95.5%
Overall	13.4	11.3	90.0%

To find out more, visit: [origo.com](https://www.origo.com)

Origo Transfer Tracking

The service is available through our Integration Hub enabling advisers to track the progress of their client's transfers online. The service provides real-time information which means no more calls from advisers chasing up on progress updates.

Benefits

For Providers and Platforms

By setting this up within the Integration Hub, you can show the exact progress of a transfer to advisers... and it's all online!

Significant reduction in calls
chasing for progress updates on pension, ISA and GIA transfers.

Reduced costs
for handling queries from both advisers and clients.

Improved customer service
for advisers and their clients.

Easy integration
with adviser platforms, consumer extranets, call centre applications.

Accurate and timely
Transfer Service Management Information.

For advisers

Financial advisers will be able to see and track the progress of their clients' transfer online. This means a significant reduction in phone calls to check status and completion timescales and improves the customer service for advisers and their clients.

To find out more, visit: **origo.com**

Origo Transfer Tracking

What makes Transfer Tracking unique?

Transfer Tracking is the only service in the market that enables you to track your transfers! Platforms and providers take data from our Transfer Service in real time and are able to display this information, in any of their communication channels, for their advisers and clients.

How does Transfer Tracking work?

Our Origo Transfer Service supplies the data to our Integration Hub and tracking data is sent to you, the platform.

Set-up

We set you up in our User Acceptance Testing environment.

Configuration

The platform enters preferred settings. This includes setting up the frequency of the data.

Build

The platform builds the user experience and journey for the Transfer Tracking screen into the portal.

Testing

Test the service to make sure it's good to go.

Go-live

Once testing is complete, all settings are applied in 'Live' by Origo.

To find out more, visit: origo.com



**Have any questions
or require further information?**

Email us at
hello@origo.com

Call us on
0131 385 8888

Visit our website
origo.com

Origo is dedicated to improving the UK
Financial Industry's operating efficiencies
and lowering operational costs.

Unipass is a brand of Origo Services Ltd and
is integral to the unique services we provide.

