

Finio data hub for software providers

Finio provides clean and enriched data, that's easy
to connect to and available in multiple formats.



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Data is the new oil. Like oil, data is valuable, but if unrefined, it cannot really be used. It has to be changed into gas, plastic, chemicals, etc. to create a valuable entity that drives profitable activity; so must data be broken down, analysed for it to have value.

Clive Humby



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Why data matters for software providers

We know the problems within the wealth management industry when it comes to data and integrations. Finio was born out of a need to knit together investment platforms, third-party software providers and advisory firm's data. Not only to integrate them but to standardise and reconcile the data to make it as easy as possible for you to access clients' investment data, in a consistent and easy to access format.



Efficient business operations

Good business data plays a vital role in optimising operational processes. Receiving reconciled data from investment platforms in a normalised way by connecting to one data hub, reduces the need to build to multiple endpoints and ultimately saves you time and money.



Competitive advantage

Integrating with a third-party data feed allows you to focus on your core competencies, without diverting resources to develop and maintain expanding API endpoints to multiple investment platforms. This reduces integration resources, enabling you to spend more time delivering the most value to clients.



Focus on what you do best

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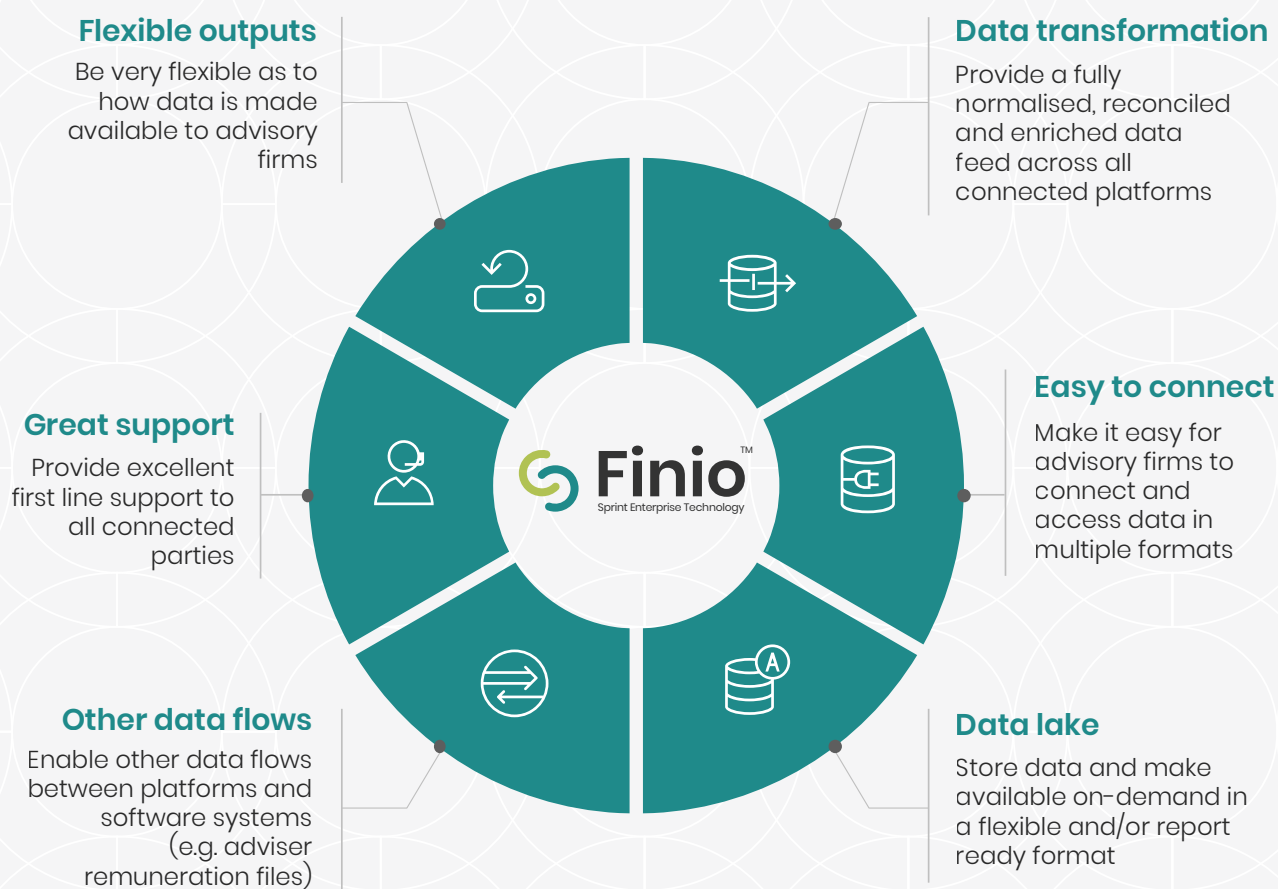


In the ever-evolving landscape of UK wealth management, where data-driven decisions are paramount, our commitment is to provide the tools and solutions that shape the future of wealth management services. By placing a premium on reconciled data, we ensure that financial advisory firms have the resources they need to navigate the complexities of portfolio management, performance analysis, and tax planning effectively.

**Gary Shepherd, business development director,
Sprint Enterprise Technology**

Finio in a nutshell

For **software providers** who need to access investment platform data, Finio is a data hub that provides a single source of data from multiple platforms. Unlike other hubs or companies building their own integrations, Finio delivers fully reconciled and enriched data in a consistent format across platforms, together with ongoing support.



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A single two-way integration between, say, a platform and a risk profiler may be great for their users but is of little greater good in isolation. The potential benefits of industry-wide integration, however, are enormous.

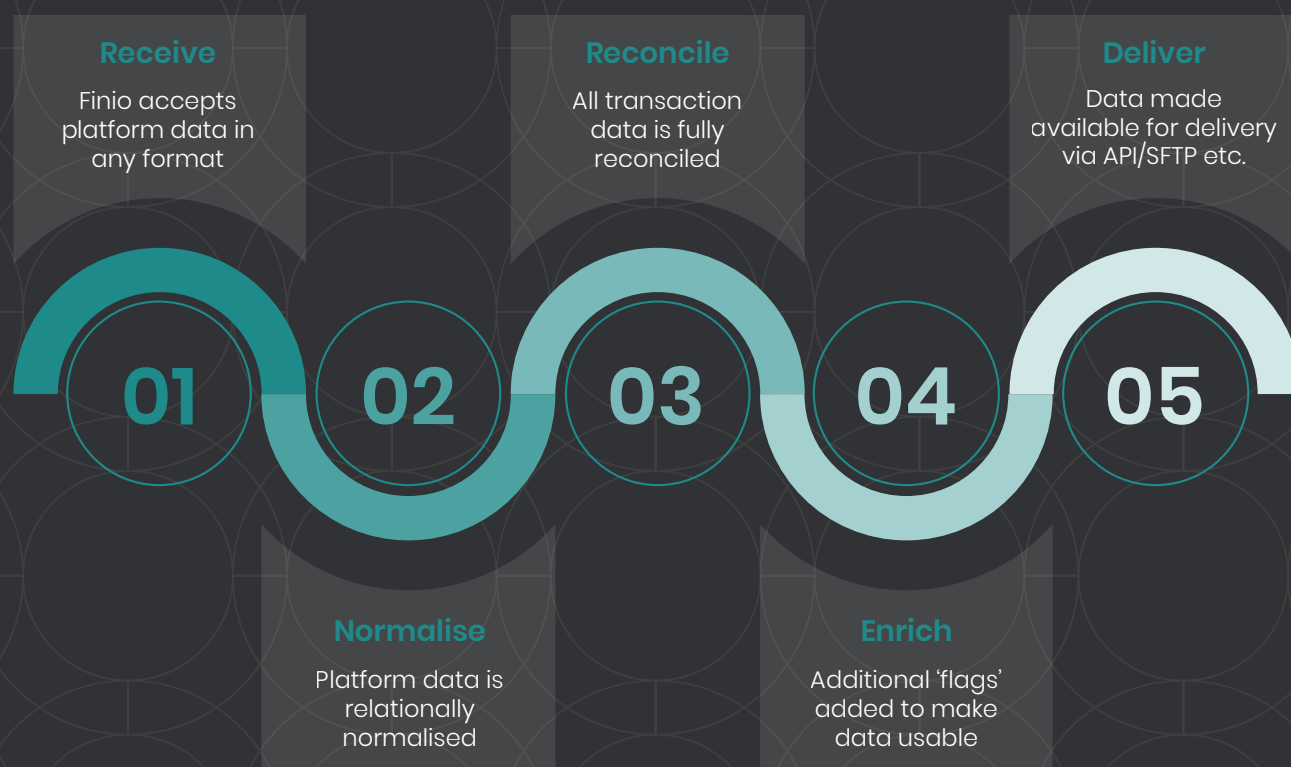
Verona Kenny, managing director, Intermediary, 7IM

(Money Marketing, 'The big question no one dares ask on adviser tech',
11 September 2023)

Simplifying complex data

Client investment data is a very complex beast and only gets more complicated when you factor in the different formats from multiple investment platforms, third-party software providers and your own requirements. Finio simplifies this for you and removes the frustration and ultimately expense of utilising data.

Finio has five core processes to help software providers tackle the ever changing and difficult wealth management data landscape...



You're in safe hands

Backed up by experience and industry recognition

Sprint Enterprise Technology was formed in 2010 by a group of highly experienced and successful financial advisers and technology entrepreneurs with a deep understanding of the industry's needs.

We put our heads together and realised a new data hub that cleansed and normalised data, plus a customer reporting solution were both missing from the wealth management market, and the rest they say is history.

We're committed to becoming the go-to solution that empowers and transforms the wealth management industry, providing unparalleled data management and client reporting capabilities that set new standards of excellence.

Through dedication and innovation, we aim to redefine how wealth management organisations harness the power of data, to drive their success and elevate the overall client experience.

And, we've won some awards along the way...



Client feedback

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The move to integrate with Finio was an easy decision. Put simply, providing enhanced, good quality data in an efficient and integrated way is becoming a key requirement for the more forward thinking advisers – it's increasingly how they tell us they want and need to do business. We are therefore delighted to be among the first solutions providers to adopt Sprint's data hub, as it helps us open up and enhance advisers' digital offer to the people who matter most – the end clients.

Tessa Lee, managing director, moneyinfo

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Plannr is delighted to be utilising the Finio data hub from Sprint Enterprise to deliver enhanced platform and provider information for our customers and ultimately their investors. Sprint share the same vision as Plannr, that all data available from platform/providers should be made easily accessible through CRM systems and Finio enables us to do this seamlessly. Powering up-to-date valuations, client portal displays, standard/on-demand client reports and remuneration for the companies themselves. We look forward to working with Sprint's Finio data hub to drive enhancements in this area over the coming months.

Nick Harper, director, Plannr

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Adviser Cloud is thrilled to utilise the services of Sprint Enterprise and their Finio data integration hub solution. It bolsters our data integration capabilities benefiting the users of our software and their end clients. Connecting to Finio was a seamless process, and it has proven to be a dependable and steadfast data hub since implementation.

Ewan Humphreys, tech lead, Adviser Cloud



Finio highlights

Sprint Enterprise Technology

Through dedication and innovation, we aim to redefine how wealth management organisations harness the power of data, to drive their success and elevate the overall client experience.

Common uses cases for software providers

- Efficient business operations – connect to one hub = reduced endpoint building
- Competitive advantage – give your clients access to 'best of breed' data
- Focus on what you do best – build software your clients love

Multiple data types available

- Valuations
- Transaction data – historical and moving forward
- Inflows and outflows
- Adviser remuneration
- Fees

Flexibility on how to connect and deliver the data

- | | | |
|------------|--------|-------|
| → Rest API | → JSON | → CSV |
| → SFTP | → XML | → PSV |

We love talking to people about investment data, so feel free to [contact us](#) and arrange a call at your convenience.

Don't let data slow down your business – it's time to Sprint!



“The Finio data hub makes access to platform data easy. One connection provides access to a fully normalised data feed from multiple platforms. And not just that, Finio makes sure the data is accurate, ready to use, and delivered in a flexible format for software providers.”

Robin Bevan
CEO, Sprint Enterprise Technology

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Book a call:

