

# Pension Switching



## Seamlessly combined with risk profiling and research

Pension Switching is an optional module within Defaqto Engage that helps you compare multiple defined contribution pension switching scenarios.

defaqto  
engage



## How it works

Fully integrated with Defaqto Engage, the Pension Switching module allows you to compare multiple defined contribution pension switching scenarios easily, including partial switches.

It includes a Reduction in Yield and Critical Yield calculator that includes your fees and any preferential terms to illustrate the actual difference between the scenarios.

With over 1000 Defaqto risk rated funds and DFM MPSs to choose from, and integrated risk profiling, you can rebalance portfolios directly within the workflow as well as integrate your CIP and model portfolios.

It also allows you to create switch, research and suitability reports as part of the workflow.



### Benefits of Pension Switching



**Save time and money** - risk profiling, pension switching, portfolio rebalancing and reporting all in the same place



**Easy to use** – compare multiple scenarios in one view



**Configurable** – have a consistent methodology throughout your advice process that can be integrated with your back office system



**Compliant** - Designed to meet FCA guidelines and follow COBS rules

Pension Switching can be added to your Defaqto Engage licence for an additional fee.

To book a demo, or buy a licence for our software:



Call us on **01844 295 546**



Email us at **sales@defaqto.com**



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