

FOR IMMEDIATE RELEASE – 18 September 2017

Plum Software complete integration with CashCalc

Integration that makes perfect sense

We are delighted to announce the recent integration initiative between [Plum Software](#) and [CashCalc](#), who manage a suite of financial tools designed by planners, for planners.

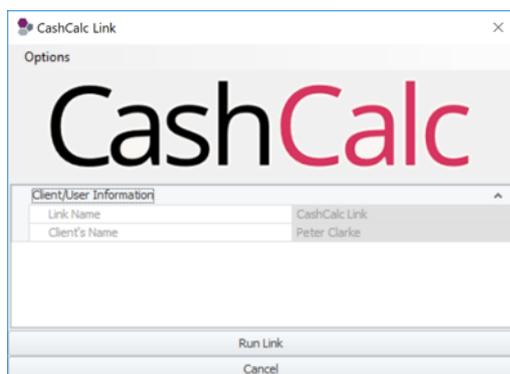
Financial advisers who use the back-office system provided by Plum are now able to import data directly from their back-office system and into their CashCalc account.

David Felix-Davies, Sales Manager at Plum said **“By working together with CashCalc we will be able to enhance and expand the Plum system for all of our existing and new clients.** He added **“We have a long-standing history in providing solutions to UK Financial Advisers and share CashCalc’s vision for the future of wealth management centred on efficient and transparent solutions for advisers and their investors”.**

Ray Adams, Director of CashCalc commented **“With the ever increasing client demand in the UK for technology solutions addressing the growing complexities of a financial services business, including improving productivity, this interation with Plum Software bridges the gap of those requirements”**

For a client of Plum Software all that is required is three simple steps

1. Select CashCalc from the ‘partner dropdown option’ within their Plum Software back-office system.
2. Enter the CashCalc login details.
3. Confirm permission is given for Plum Software to integrate their account.



The screenshot shows a dialog box titled "CashCalc Link" with a close button (X) in the top right corner. Below the title bar is a section labeled "Options" containing the "CashCalc" logo. Underneath the logo is a section titled "Client/User Information" with a dropdown arrow. This section contains two input fields: "Link Name" with the value "CashCalc Link" and "Client's Name" with the value "Peter Clarke". At the bottom of the dialog box are two buttons: "Run Link" and "Cancel".

This will then push all relevant data across and into the client’s [CashCalc Client Profile](#), all information entered into Plum back-office system can be imported into the CashCalc account

ENDS

Notes to Editor:

For more information regarding Plum Software or setting up the integration with Plum Software, please contact David Felix Davies on david.felix-davies@praemium.com or crmsupport@praemium.com. Tel: 02476 228 888

For more information regarding CashCalc, please contact info@cashcalc.co.uk. Tel: 01633 851808

About Plum Software Limited

Based in Coventry, England, and founded in 1993, Plum Software is a leading provider of back-office solutions for the entire financial planning office, such as client management, financial planning, compliance and adviser reporting.

Plum has established a broad range of third-party data feeds and interfaces with specialist product providers and platforms across the mortgage, investment, pension and insurance markets

It attributes more than *20 years of success* to the quality of their products and the strong relationships it builds with customers and partners.

It is a wholly owned subsidiary of Praemium

About CashCal

CashCalc started out with one simple ambition: to simplify the process of cash flow planning. Developed by a team of Chartered Financial Planners in South Wales during 2014, CashCalc has since become pioneers in the financial planning field. Through hard work and dedication, the company has grown beyond recognition and is now one of the fastest growing software providers within the UK financial services industry.