



Unipass
Letter of Authority

By
ORIGO

What our customers say:

Unipass Letter of Authority



Unipass Letter of Authority

Now with significant upgrades

Unipass Letter of Authority (ULoA) is our **award-winning**, efficient, digital solution to the onerous and manual LoA process.

The service is **free for advisers**. All you need is a Unipass Identity to start using ULoA. We built ULoA to address the long delays often associated with the traditional LoA process, and adviser feedback confirms that we've delivered on this promise.

Recent significant upgrades to ULoA:



Whole-of-market provider coverage: A single method for sending LoA requests to any UK platform or provider that can receive digital LoA requests.



Upload a checklist: Upload a checklist of data items per product in your request, ensuring you gather the data you need for each policy.



Receive notifications: Get updates from subscribed providers when your case has been received, accepted, or fulfilled, to a mailbox of your choice for each status change – reducing your chaser calls!

Unipass Letter of Authority

Now with significant upgrades



Mark as Complete: Did you get a response to your letter of authority request via email? You can now mark it as 'complete' within Unipass Letter of Authority, keeping your audit trail and requests up to date and in one place.



ZeroKey integration: Reducing the need for manual data entry, ZeroKey can save advisers up to two minutes per submission while reducing errors, and connecting client data instantly across multiple back-office software systems, including intelliflo and XPlan.

Quick Steps to Get Started

Free for advisers and easy to sign up for, all you need to get started is a Unipass Identity.

- If your firm is already registered for ULoA, you can [start using the new features](#) now.
- If you already have a Unipass Identity and want to register your organisation on ULoA you can [register for free](#). Once your Firm has registered, you will be able to submit LoA requests immediately.
- Need to sign up for Unipass Identity first? [Apply for a free Unipass Identity](#).

Use Unipass Letter of Authority



Apply for Unipass Identity



Survey Highlights

Adviser Feedback

To strengthen our understanding of adviser experiences with Unipass Letter of Authority following recent service enhancements, we conducted a comprehensive survey in 2025. We invited ULoA users to participate and received detailed responses from over 150 adviser participants.

Our booklet incorporates genuine adviser insights from this survey, showcasing real-world results and benefits that advisers are experiencing with ULoA.

Overall Satisfaction

71% of advisers rate their ULoA experience as either 'Excellent' or 'Good'



"It has been a game-changer for me. Makes LOA work actually enjoyable. Responses tend to be quicker."

Jane Lewis, Bellamy Wealth Management



Survey Highlights

Overall Satisfaction

“We have rolled this service out to the whole company who now use it and we are slowly stopping sending written letters/e-mails to providers due to trust in the system.”

Ben Shaw, Arena Investment Management Ltd

67%

would recommend ULoA to a colleague



“We have submitted over 200 LOA's now and these can be done with ease within 5 mins.”

Ben Parkin, Fairstone Private Wealth LTD

91%

of advisers found signing up to ULoA either 'Very easy' or 'Easy'

Survey Highlights

Speed and Efficiency

Advisers consistently highlighted in feedback the time savings achieved through ULoA's streamlined process, accelerating response times and reducing manual procedures.



Since using the service, I've had no issues, and my turnaround times have been fantastic. I've found the service to be efficient, fast, and significantly easier to manage compared to our previous process for handling LoAs."

Jade Gall, David Williams IFA



"I had policy info from a company that is very slow, within 48 Hours!"

Paul Pugsley, SDM Financial Planning



"The service has made the whole process so much quicker. I like the response from providers once they have received the request. The turnaround time is great usually."

Kylie Woods, Dennehy Wealth



Survey Highlights

User interface

“The user interface is well-structured and easy to follow when inputting data. I particularly appreciate the “unsure” option for policies, as it significantly reduces the time spent gathering information for submission.”

Anonymous IFA

76% of advisers found the user interface ‘Very intuitive’ or ‘Intuitive’

“It is so amazingly quick and can be done like shelling peas! It truly is a wonderful step forward.”

Paul Pugsley, SDM Financial Planning

“Very user-friendly and the training videos were great, the experience has been very smooth from start to finish.”

Matthew Odell, Atlas Personal Wealth Management



Survey Highlights

Centralisation and Organisation

Advisers value having all LoA requests in one centralised location, reducing administrative burden and providing clear tracking across multiple providers and policies. This consolidation simplifies firm-wide rollout and collaboration.

"I normally submit to multiple providers at once and this new feature makes that so much easier and quicker all round giving better service to clients and helping managing my workloads in a more efficient time scale."

Lauren Connell, Dodd Wealthcare

"This has made my life so much easier - I don't have to consider what specific address or department it needs to be sent to, so all the hard work has been taken out of the submission process."

Kirsten Warren, Corbel Partners Limited



"I have rolled this out to the firm following initial analysis of the functionality and process - Overall, it is incredibly handy (and time saving!)"

Georgia Mackelden, SG Wealth Management

Survey Highlights

Business Impact and Cost Savings

Advisers report significant operational efficiency gains, from reduced postage costs to decreased administrative workload. ULoA delivers measurable business value and improved client service delivery timelines.

"Very efficient and fast service - does not require for extra checks with other providers. Already vouched for the system and the efficiency it has improved in the practise."

Arturs Novikovs, Brooks Wealth Management

"This will be our main LOA process for 2025 and beyond. The fact that this is now a one stop shop make LOA admin a thing of the past."

Alan Cross, AKC Independent Financial Advisers Ltd



Survey Highlights

Provider Coverage

The whole-of-market provider coverage is highlighted as a major step forward, particularly for firms with complex multi-provider client portfolios. Advisers appreciate not having to verify which providers accept ULoA or manage multiple submission methods.

"Saves a lot of time and simplifies the overall LOA process. Saves having to organise LOA's to multiple providers via different methods."

Andrew Smith, CG Wealth Planning Limited



"The addition of the whole of market providers is a massive improvement to the system compared to 12 months ago. Long may the development of the ULoA continue Getting more providers to provide notifications is hopefully the next step."

Ben Shaw, Arena Investment Management Ltd

Survey Highlights

Training and Support

Advisers highlight the quality of training resources and responsive customer support provided by the Origo team, which helps with adoption and troubleshooting



"The team that deal with any enquiries or issues are very quick to respond and are extremely helpful."

Jane Lewis, Bellamy Wealth Management



"Brian Moffat was really helpful and provided me with a blank LOA template I can use in meetings to submit alongside any requests."

Anonymous IFA



"The help chat is brilliant and I've always had a speedy reply to a couple of queries raised."

Sharon Twigg, 2Plan Wealth Management



Advisers, join the letter of authority revolution:

Discover the better way to LoA, try Unipass Letter of Authority for free and unlock the fast, efficient one-stop shop LoA service. Join the thousands of advisers already utilising Unipass Letter of Authority:

Use Unipass Letter of Authority



Find Out More



Providers: looking to integrate with Unipass Letter of Authority?

Already receiving requests via ULoA and want to gain MI, reduce multiple FTEs and provide an enhanced experience to advisers?

ULoA for Providers

