

# From Migration Madness to Migration Masters: How Origo Asset Migration Empowers UK Advice Firms



# Contents

<b>Defining Origo Asset Migration</b>	<b>Page. 3</b>
<b>The Main Migration Problems for Advisers</b>	<b>Page. 4</b>
<b>Key Benefits</b>	<b>Page. 5</b>
<b>Scottish Widows as our Beta Partner</b>	<b>Page. 6</b>
<b>How does Origo Asset Migration Work?</b>	<b>Page. 7</b>
<b>Adviser Feedback</b>	<b>Page. 7</b>
<b>Useful OAM Resources</b>	<b>Page. 8</b>
<b>Use Origo Asset Migration</b>	<b>Page. 9</b>



Origo Asset Migration (OAM) is a project management tool designed to help advisers transfer clients in bulk from one platform to another.

It offers guided data cleansing, client categorisation, and transfer tracking to streamline and organise the entire migration process. Furthermore, integrated account opening and transfer initiation occur with the receiving platform, making the journey end-to-end.

## Defining Migration

We use the term “asset migration” to refer to the coordinated transfer of clients’ holdings, often in bulk, from the old platform to a new one, as recommended by an adviser firm.

This isn’t just a technical handover; It’s a high-touch, multi-stage journey that involves preparing and cleansing client data, segmenting customers into relevant groups, and securing approvals and documented advice before any move takes place.

# The Main Migration Problems for Advisers

Before we address the solution in full, let's recap the current state of play in Financial Services for you, advisers, when it comes to the bulk asset migration process.

## **Migration Madness:**

Infrequent migrations can feel overwhelming; some firms may have limited in-house data expertise, which can increase errors.

## **'Migration masters' Expectations:**

Often, there's a distorted reality that financial advisers are assumed to be migration masters. Whilst some advisers may be more familiar with the process than others, the transfer of assets in bulk is typically not a frequent occurrence; therefore most migrations are usually onerous and time-consuming, coupled with the inherent risk of project errors or even abandonment.

## **Inconsistent Processes:**

Receiving platforms will need accurate data for the migration, and require adherence to their data formats and policy information, causing delays and confusion.

## **Compliance & Security Risks:**

Still sending that spreadsheet over email? This exposes sensitive data, creates audit challenges, and raises huge compliance concerns.

## **Poor Communication & Tracking:**

No real-time updates or central tracking; advisers worry about timelines, paperwork issues, and client trust.

# Key Benefits for Advice Firms



## Data Cleansing Support:

Prepares and cleans client data to reduce errors and ensure smooth migration to the receiving provider.



## Streamlined Workflow:

Automated transparent process visible to both the adviser and receiving platform saves admin time and boosts client focus.



## Audit Log:

Detailed audit logs during and after transfer initiation, creates transparency, improves reporting and aligns with compliance requirements.



## Clear Data & Automation:

Upfront requirements and automated feeds cut ambiguity and manual entry.



## Artificial Intelligence:

AI-powered field mapping allows seamless integration and superior data accuracy which means fewer errors during the transfers of the clients.



## Improved Communication:

Traceability of process improves communication and relationships with platforms and clients.

# Scottish Widows Intermediary Platform as our Beta Partner

During the Beta phase, our expert team will work concurrently with Scottish Widows Intermediary Platform and several large, national advice firms to gather feedback and help steer the ongoing development of the service.



“ —

A transfer recommendation is often the first interaction an adviser and their clients will have with a new platform, and we want to make sure their experience is a really good one.

“ —

At Scottish Widows, we are committed to supporting advisers and their clients, both now and in the future. Our focus is on enhancing our platform proposition to make it easier for advisers to deliver great outcomes for their clients and grow their business.

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**Tom Mullally,**  
Chief Product Officer,  
Origo

— ”



**Ross Easton,**  
Head of Adviser Platform  
Proposition,  
Scottish Widows

— ”

We are thrilled to have worked with Origo to develop a solution that helps advisers de-risk their business, increase efficiency, and supports them to deliver great client outcomes.

# How Does OAM Work?

The service covers the entire client-level transfer process: from initial client and policy data gathering to transfer tranche creation, while providing an aggregate tranche view. This ensures a smooth and clear roadmap throughout, which is all available via an intuitive online portal! Our service also covers client engagement on suitability, illustrations, and authority, right through to account opening and final asset transfer completion.

Whilst transfer projects can be managed in aggregate, each client's journey is individual, and advice firms can submit transfer instructions at their own pace, whether that's client by client or in bulk. OAM provides advice firms and platforms with detailed audit logs during and after transfer initiation.

## Adviser Feedback

During our Beta phase, we are working closely with select large national advice firms to ensure you really get the most out of our latest digital offering.

Here's what some advisers have said about the service so far:

“—

Very straightforward, which is always what we want. Really easy.

—”

“—

The data sense checking is great. This is a really good tool for us to implement.

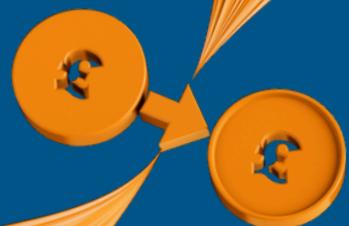
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# Contact our Migration Experts

Collaboration between advice firms and platforms is key to advancing bulk asset digital migration. When you highlight the benefits of streamlined migration to your platform partners, you help drive sector-wide progress, just as national firms and platforms like Scottish Widows Platform are already doing with OAM. Your support accelerates industry-wide adoption.

Could your advice firm benefit from a more streamlined and auditable bulk migration process?

If so, our team would love to have an initial chat with you to understand your common migration pain points and to discuss how Origo Asset Migration can empower your advice firm to become a migration master by conducting digital migrations where security, and efficiency are prioritised.



# Discover how Origo Asset Migration can further empower your Advice Firm's bulk migration process

Learn more about  
Origo Asset Migration

