

All-inclusive high standard pension advisory

Sampension launches new advisory tool with PensionPlan



Obex

#UnlockTomorrow
www.keylane.com

 **Keylane**



Challenge

Following implementation of the PensionPlan solution, Sampension significantly strengthened its efforts to provide best quality holistic pension advice.

Sampension's flexible range of pension products ensures customers a large degree of individual choice freedom. Therefore, Sampension's client advisory services aims to ensure that customers get the most out of their wide choice possibilities along with Sampension's high returns and low costs.

By implementing the Keylane PensionPlan solution, Sampension's counselling can now account for the customer's complete economic situation including household aspects. In this way, PensionPlan has been a key factor in Sampension's ability to make their customers' pensions worth more.

Solutions

Sampension's solution is built around PensionPlan, which in addition has been boosted with significant integrations including PensionInfo.

Sampension has prioritised an overall solution with system integrations that ensure fast execution and high quality of the data for inclusion in the advisory process.

Therefore, the system can, at any time, specifically account for the customer's personal situation, such as retirement savings and insurance which covers disability, illness or death.

Backed by useful system integrations, customer disclosures,

taxation, public services, and more, Sampension can provide concrete recommendations for how the customer can optimally take advantage of their free choice among Sampension's wide range of products.

In PensionPlan, the advice session ends in a single operation along with a complete customer report and case execution to Sampension's quoting system.



Value

- Quick overview of the customer's and the household's financial situation – including income before and after tax
- High level of system integration and automation ensuring an effective advisory process that minimizes administrative costs
- All pension plans, taxation factors and public services as well assets and loans are now included in the counselling process
- Optimised investment profiles for customers based on Pension-Plan's information about the customer's economic situation and potential risk
- Full ability to provide holistic advice based on a qualified and reliable foundation
- Focus on counselling rather than on data collection and entry

"The launch of "Pensionstjek" has strengthened Sampension's efforts to deliver an all-inclusive, high standard pension advisory. All necessary financial conditions are included when the advisory is tailored to the customer's individual needs and life situation. With "Pensionstjek" Sampension will strengthen its position and become market leading among labour market pension providers."

Ole B. Tønnesen, Director

Sampension

**Sampension is essentially
a non-profit life insurance
company**

Its strategy is to provide efficient management of pension funds for the labour market together with investment portfolios at low administration costs. Sampension's results prove its success at reaching these goals.



About Keylane

We are the leading SaaS platform provider for the insurance and pension industry. We empower the insurance and pension industry to transform their business and achieve their goals through innovative solutions that redefine how insurance software works. Over 150 customers across Benelux, Nordic and DACH regions run their business on Keylane platforms.

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