

Advisers to benefit from ZeroKey integration with Transact

ZeroKey, a web app dedicated to eliminating manual data entry for financial advisers, has successfully integrated with Transact's new Account Opening API, which will be compatible with Zerokey's ever expanding ecosystem of integrations.

The collaboration addresses the common frustration of manual data entry by automating the transmission of data from an adviser's back office system, planning tools and software to Transact. This will enable ZeroKey users to write Transact illustrations and complete portfolio applications effortlessly.

The integration is the latest demonstration of Transact's strategy to connect with leading technology providers to create a more efficient technology ecosystem for advisers.

Tom Dunbar, CEO of Transact, commented:

"We are very pleased to see ZeroKey connect to our Account Opening API as data entry can be a significant pain point for advisers. ZeroKey users can now create Transact illustrations and complete applications quickly and confidently. This integration is a great example of our desire to make financial planning easier for advisers."

Joseph Williams, CEO of ZeroKey, added:

"Transact has an excellent reputation in the UK adviser platform market. We are delighted to now offer a seamless connection to Transact's Account Opening functionality, helping our users eliminate manual data entry and therefore retain data integrity. This integration shows how Transact and ZeroKey can help develop a scalable solution to help simplify the financial planning process."

Contacts

For further comment please contact:

Tom Dunbar (Chief Executive Officer, Transact)

Andrew Cullen Jones (Chief Development Officer, Transact)

Joseph Williams (Chief Executive Officer, Zerokey)

Notes:

About Transact

Transact is a leading independent UK investment wrap platform.

Transact's parent company, IntegraFin Holdings plc, is listed on the London Stock Exchange and is a constituent of the FTSE 250 index. Established in 2000, Transact holds over £65.9

billion of funds under direction on behalf of over 241,000 investor clients (as at 31 March 2025).

About ZeroKey Technologies Limited

ZeroKey is a web-app with a mission to integrate technology and eliminate the need for financial advisers to manually key data. It seeks to achieve this by offering ready-made integrations that require zero-code, enabling them to easily integrate their entire tech stack and move data from A to B on demand. Founded in 2023, the web-app is brought to you by the same people who brought you CashCalc.