

Pension Fusion go live signals pensions dashboards technology is a reality

London, UK, March 6, 2025 - Pension Fusion, a partnership between Equisoft and Lumera, is pleased to announce that from today they are the first entity to have completed the full end-to-end Pensions Dashboards connection journey, with the WTW Administered LifeSight Master Trust who as a result, have onboarded to the ecosystem.

As confirmed by [the announcement from the Department for Work and Pensions](#), together Equisoft and Lumera have been the first Voluntary Participant to successfully navigate each stage of the Pensions Dashboards Programme (PDP) connection journey. The final step of the onboarding process was to complete Operational Acceptance Testing (OAT) which consisted of receiving and successfully processing the first Find Request sent in the live PDP environment. Pension Fusion is now ready to onboard the rest of its connecting schemes, to meet the closely approaching guidance dates that trustees need to achieve thereby, making the data of over 15 million members 'findable' through a pensions dashboard.

Oliver Morley, CEO of the Money & Pensions Service, said: "Pensions dashboards will be a game-changer for retirement planning, and I'm grateful for everything Pension Fusion have been doing to get us to this point. Their hard work puts us in a strong position as we prepare for wider industry connection from April."

As Nick Meredith, Product Director, Europe for Equisoft explains: "We are delighted that we can now go live with the successful development of our pensions dashboards Integrated Service Provider (ISP), suitable for any scheme or administrator. This is a significant milestone for pensions dashboards that highlights just how close we are to having schemes and importantly consumers, connected to the ecosystem."

Jelena Croad, Head of LifeSight, UK said: "This is a really important milestone on the journey towards making dashboards a reality for pension scheme members. Enabling people to see their pension pots in one place, in real time, and with clear financial information will make a huge difference to people's awareness of their retirement finances. LifeSight is proud to be a part of this important next step."

Maurice Titley, Commercial Director for Lumera and PASA Dashboards Working Group Chair, adds: "The central digital architecture is the linchpin of pensions dashboards, and establishing its connectivity with schemes marks a crucial milestone. Our deep collaboration with the PDP and the innovative services we have developed, such as our flexible matching solution, has helped drive this progress. We're proud to have built an ISP that the industry trusts, enabling us to make a lasting, positive impact on the future of UK dashboards."

Nick concludes: "Now that pensions dashboards are soon to become a reality, it is not the time to take our foot off the pedal. This really is the start of the journey for Equisoft, our clients and the industry as we prepare to stage more schemes, in readiness for the MoneyHelper dashboard consumer testing due to start later this year."

Press Release

March 6, 2025



About Pension Fusion

Pension Fusion offers a software solution, infrastructure and data management, which connects data providers to the pensions dashboards ecosystem.

As two independent technology leaders Equisoft and Lumera have pooled their specialist resources, skills and technical capabilities to develop an open-market pension dashboards connection, suitable for any scheme or data provider.

Pension Fusion's core solution helps schemes to comply with pensions dashboards regulations via a simple, secure and reliable connection. Providing the business critical, system- and scheme-agnostic software to link scheme data to the dashboards ecosystem. With data normalisation and flexible options to support accurate data matching, schemes can be confident their members will find their pensions.

To learn more, visit <https://www.pensionfusion.com/>

About Equisoft

Founded in 1994, Equisoft is a global provider of advanced insurance and investment digital solutions. Recognized as a valued partner by over 250 of the world's leading financial institutions, Equisoft offers a complete ecosystem of solutions, from innovative front-end applications to extensive back-office services and unique data migration expertise. The firm's flagship solutions include SaaS policy administration, CRM, financial needs analysis, financial planning, asset allocation, fund and portfolio analysis, quotes and illustrations, electronic application, agency management systems, as well as customer, agent and broker portals. Equisoft is also Oracle's largest and most experienced partner for the OIPA platform. With its business-driven approach, deep industry knowledge, innovative technology, and multicultural team of experts based in North America, the Caribbean, Latin America, Europe, Africa, Asia and Australia, Equisoft helps its clients tackle any challenge in this era of digital disruption. Having been acquired in July 2021, Altus Business Systems based in the UK rebranded as Equisoft in January 2023.

For more information, please visit www.equisoft.com.

About Lumera

Lumera is dedicated to the digital transformation of the European Life and Pensions industry. As insurtech innovators, we provide technology solutions covering policy administration, data management and migration to a broad, blue-chip client base. We also combine our tech and industry expertise to offer a comprehensive range of specialist services, tailored for each local market.

The Prudent Revolution is our mission – bridging technology and partnership to navigate the fastest, safest path through complex change for L&P providers.

Based in Stockholm, Lumera has significant presence with offices in the United Kingdom, the Netherlands, Norway, Sweden, India and Vietnam. Lumera is majority owned by Monterro, the leading software investor in the Nordic region.

For more information, visit www.lumera.com.

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