

**FINAL**



## **BECKETT SELECTS INTELLIGENT OFFICE**

**26 February 2007**

The Beckett Investment Management Group, one of the largest regional Independent Financial Advisers in the UK, has chosen Intelligent Office (IO) from IntelliFlo to provide front and back office technology for its team of over 20 advisers. Beckett is one of the largest regional Independent Financial Advisers in the UK. For nearly 20 years they have provided a comprehensive financial and investment planning service for individuals, companies, partnerships, pension funds and trusts. Today, they have over 10,000 clients, many of whom have been with them since the 1980's, with total funds of over £200 million. Intelligent Office, a totally web-based solution, will be implemented across the organisation as a replacement to their existing back office system.

Intelligent Office has a wide range of front and back office features including full fact find, research tools, suitability letters, client management, workflow, compliance, risk-based file checking and commissions management. The system also features dashboards that provide a summary of work in progress for each user and facilitate quick navigation to different parts of the system, depending on the task in hand.

Intelligent Office, which already has over 4,000 users, is fully scaleable meaning that it can be used by any size of organisation from a one-man band to a multi-national company, and organisations can easily add more users.

Chris Barnes, Managing Director at Beckett commented, "We undertook a strategic review of our business last summer and concluded we needed to drive a change programme throughout the company. In order to better service and work with our clients it was clear that we needed to update and significantly improve our back office systems.

We wanted to do this quickly and stay within a defined budget. We worked with our new IT consultant partners AT8 in firstly making a vendor selection – IntelliFlo were clear winners of the tender process. Delivered within budget and on time, in less than 6 months we now have a new system and have migrated over 10,000 client records.

As MD, I am delighted with the support received from both AT8 and IntelliFlo. We are now well placed to capitalise on our increased efficiency in an ever changing and challenging environment for IFA businesses.”

Mike Hill, Associate Director, IT & Projects at Beckett commented, “Being a long-established company had carried with it the problems associated with ageing legacy systems and the move to best of breed will enable us to fully utilise our experienced staff for the benefit of our clients.

One of the big plus points for me working on the project was that, rather than just taking on a new back office system, we were forging a real working relationship with a forward-thinking, enthusiastic and friendly company. Intelligent Office is a functionally rich product that we intend to make full use of and I am sure that, with the support we get from the staff at IntelliFlo, we will achieve our goals.”

Nick Eatock, Chief Executive Officer of IntelliFlo added, “We are delighted to add a company of the quality of Beckett to our expanding client list. Intelligent Office is flexible and always up to date so it is ideally suited for businesses where the level of service to clients is important. This is a great start to 2007.”

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**Editors’ notes**

**IntelliFlo** has been providing Information Technology services to companies large and small since its formation in 1997. Its team of dedicated IT and business professionals have collective expertise across many different markets and are highly skilled in a whole

host of technologies. They have proven experience in delivering effective solutions meeting a wide range of business needs. In the last year IntelliFlo has made over 800 major enhancements to Intelligent Office and continues to deliver further enhancements to the product at a rapid rate.

Nick Eatock founded the original IntelliFlo business in 1997 and has built the company into a leading software provider to the financial services market. Nick also spearheaded the MBO of the company in 2004 enabling IntelliFlo to move to its next stage as an extremely well-funded operation providing strong enterprise technology with an impressive and growing client base.

### **The Beckett Investment Management Group**

The Group has two divisions, Beckett Financial Services (BFS) and Beckett Asset Management (BAM). These two operating companies are focused on specific areas of the industry and have their own individual teams of experts and consultants.

They work very closely together, which means that clients will always have access to the full range of financial products and services available in the market and consistently get first class advice from first class people.

Their teams of dedicated specialists have valuable local experience and knowledge and provide an individual service, backed by a market presence big enough to deliver superior products and innovative solutions to clients' specific financial needs.