



To: News Editors

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IntelliFlo & Cofunds combine automated valuations and commissions registration to save IFAs valuable time

Leading independent investment platform Cofunds has introduced a single registration document that can be used across all their e-services, furthering integration with Intelligent Office, the UK's fastest growing front and back office software, from IntelliFlo.

Rather than time-consuming separate registration processes for each of their e-services, Cofunds now have a single tripartite agreement between IntelliFlo, Cofunds and IFA firms using their services. This allows for automated valuations and automated commissions to be fully integrated into Intelligent Office and removes the need to complete separate registration processes each time, freeing considerable, valuable IFA time to better serve their client's needs.

This major step forward is part of an ongoing process in which both firms have been responding to client feedback in identifying ways in which they can work more closely and securely share common information. Both firms are committed to providing the best service for their growing base of mutual clients.

The only totally web-based solution in the market, Intelligent Office offers a comprehensive range of front and back office features to its users, including full fact find; research tools; suitability letters; client management; workflow visualisation; compliance; risk-based file checking; automated reconciliation, commissions and payment. Dashboards provide summaries of work in progress and quick navigation across the system keep Intelligent Office's organisational power at its users' fingertips at all times.

Intelligent Office, which already has over 4,600 users, can be fully and dynamically scaled, from one-person operations right up to major multi-nationals. As it is entirely web-based, updates can be rolled out simultaneously and continuously, making

improvements swift, smooth and future-proof. And since there is only one version of the system at any time – the live one – it is always fully supported.

Nick Eatock, Chief Executive Officer of IntelliFlo said, “We are delighted to be working with Cofunds and helping them to ensure they offer clients the best and one of most efficient web based valuation and commission services available.”

Anita Juneja, Cofunds Head of Implementation, commented, “Our aim is to help IFAs run their businesses in the way that suits them best. We are therefore delighted to improve our integration with Intelliflo still further to make their data management as simple as possible.”

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Issued on behalf of IntelliFlo by Quill Communications.

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Editor's notes

IntelliFlo (www.intelliflo.com) 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 expertise across many different markets and technologies, with proven experience delivering effective solutions to a wide range of business needs. In the last year alone IntelliFlo has made over 1,100 major enhancements to Intelligent Office and continues to deliver further improvements at a rapid rate.

Nick Eatock founded the original IntelliFlo business in 1997, building the company into a leading software provider to the financial services market. Nick also spearheaded the management buy-out of the company in 2004 enabling IntelliFlo to become an extremely well-funded operation, providing strong enterprise technology to an impressive and growing client base.

Cofunds Limited (www.cofunds.co.uk), launched in January 2001, is the leading independent fund platform for intermediaries with assets under administration in excess of £14.0 billion (at 30/09/2007). It is an independent company providing a one-stop fundmarket that provides flexible, reliable, convenient administration and management services for intermediaries and their clients. It does not offer investment management or advice, nor does it compete with intermediaries by offering its services direct to the end client. Cofunds exists to serve the needs of fund managers, intermediaries and their clients.

Cofunds is authorised and regulated by the Financial Services Authority.