

**Final**



## **FOSTER DENOVO SELECTS INTELLIGENT OFFICE**

**28 March 2007**

Foster Denovo has chosen Intelligent Office from IntelliFlo to provide front and back office technology for its high quality team of over 130 Partners. Intelligent Office, a totally web-based solution, has been 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.



Roger Brosch, Managing Partner at Foster Donovo commented, "We needed to find the right technology to ensure that we provide the highest level of service to our Partners and their clients. We provide specialist wealth management solutions for corporate and private clients and advice that is totally independent and we needed a system that matches our clients demand for quality and value in all aspects of our work. We looked at

many systems on the market and chose Intelligent Office because it offers the range of features and level of service that we require, is simple to use and represents excellent value for money. We were particularly delighted with the quality of the data migration from our previous back office system.”

Nick Eatock, Chief Executive Officer of IntelliFlo added, “We are delighted to add a company of the quality of Foster Denovo 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. 2007 continues to be a year where quality organisations are moving to Intelligent Office.”

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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.

**Foster Denovo background information**

Foster Denovo Ltd. was formed in November 2005 as a result of the re-launch of a well established independent Financial Advisory enterprise called Capital Planning UK Ltd. Capital Planning was started in April 1982 and had progressed well but the arrival of a new management team in 2005 with different ideas about future business direction heralded a new era and hence the relaunch.

Foster Denovo serves two distinct types of Client, namely, the Mass Affluent Private Client and the Corporate Client. Foster Denovo is particularly strong in Corporate business. Clients who are happy for their names to be mentioned include Live Nation, GCap, Fijitsu Siemens, Packard Bell, Lee Cooper, ING Direct and NEC Computers.

Through its 130 Partners, Foster Denovo can offer Corporate Clients a standard of service on a sufficient scale and with a continuity of service that has few, if any, rivals in the independent Sector. The Company places major emphasis on technical capability and development for all members of its working community. The attention given to service is also demonstrated by the fact that Foster Denovo has over 100 members of Staff supporting its Advisers, a ratio of Staff to Advisers that is probably unmatched in the Sector.