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IntelliFlo in market-leading integration with new Axa wrap platform Elevate

Intelligent Office, the flagship front-to-back office system from IntelliFlo, is now fully integrated with Axa's brand new wrap platform, Elevate.

Once the user's wrap account has been set up on the market-leading platform, Intelligent Office can create a mirror of its contents, allowing the user to monitor it, carry out automatic valuations – on a daily basis if necessary – and even instantly calculate commissions. Intelligent Office is the only system to be directly linked in with Elevate, or any wrap platform, in this way, making it a truly market-leading tie-up.

Paul McMahon, Managing Director, AXA Distribution Services, said: "This is not new functionality for the sake of it. Our phased and consultative approach to the launch of Elevate demonstrates our beliefs that wrap platforms must be built around adviser's needs. Our consultative adviser partners have been instrumental in helping shape the development of the functionality of the platform. Simple to use, time-saving functionality is paramount, hence our decision to develop this joint initiative with IntelliFlo."

Indeed, as a truly 'joined up' solution, it promises to be a model for the industry as a whole. Time-saving, easier to use and safer (no more errors during manual data entry, for example), more traditional, disconnected solutions start to look impractical in comparison. And with both Axa and IntelliFlo continuing to work together to develop even more advanced integration, this lead shows no sign of narrowing.

Nick Eatock, Chief Executive Officer of IntelliFlo, said: "We are delighted with the depth of integration shown between the two solutions. This level of integration truly shows how well platforms and front/back office systems can work together if both providers are intent on providing a best-of-breed approach. More traditional, disconnected solutions start to look impractical in comparison."

Intelligent Office can be fully and dynamically scaled, from one-person operations 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 compliant and fully supported.

www.elevateplatform.co.uk
www.intelliflo.com

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For further information please contact:

Fiona Harris, Quill Communications

020 7758 2230
fiona.h@quillcommunicate.com

Nick Eatock, IntelliFlo

020 8481 1110
nick.eatock@intelliflo.com

Editors' notes

IntelliFlo has been providing Information Technology services to financial services companies large and small since its formation in 2004. 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.

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 features allow for easy access to all records at the touch of a button. Intelligent Office is the fastest growing solution in the marketplace.

AXA Distribution Services

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