



Attention: News Editors

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### **Investors Planning Associates chooses IntelliFlo**

Independent financial adviser, Investors Planning Associates (IPA) has chosen Intelligent Office from IntelliFlo to provide front and back office technology for its high quality team of Associates country-wide. Intelligent Office, a totally web-based solution, has been implemented across the organisation as a replacement to IPA's 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.

Nick Eatock, Chief Executive Officer of IntelliFlo added, "We are delighted to add IPA to our rapidly expanding client list. Being entirely web-based, Intelligent Office is flexible and always up to date so it is ideally suited for businesses where the quality and level of client service are key."

Maurice Manasseh, Chairman & Managing Director of IPA added, "We have always had our own in-house system, but following a comprehensive review of the marketplace, were particularly impressed with the seamless offering from IntelliFlo. After nearly 40 years in the industry, our focus has always been on our clients and we are delighted that with Intelligent Office, all of our Associates across the country will be able to provide an even stronger emphasis on client servicing, while improving efficiency and business management for both our Associates and the Company in a highly cost effective manner."

