

To: News Editors



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Scottish Widows now offering Contract Enquiry through Intelligent Office

Scottish Widows has linked up with IntelliFlo to offer instant electronic valuations – Contract Enquiry – from within web-based front-to-back office system Intelligent Office – a real time-saver for financial advisers.

Offering contract enquiry through the web has obvious advantages to dependence on phone, pen and paper, but the efficiency gains from delivering this information online become far greater when contract enquiry can be fully integrated with the system being used by the financial adviser for their entire administrative process, as it can with Intelligent Office – the UK's only fully web-based front-to-back office solution for advisers.

Nick Eatock, Chief Executive Officer of IntelliFlo said, "Further to our commitment to work even more closely with Scottish Widows in the future, we're delighted to add them to the list of supported CE providers within Intelligent Office".

As well as saving IFAs time and trouble, the tie-up will reduce operational risk for the adviser. Room for error caused by manually keying-in information, is slashed as the valuations process is seamlessly integrated and automated. The value in terms of adviser peace of mind is considerable.

Colin Watt, Head of Digital Communications at Scottish Widows said, "Intelligent Office was identified as a key system used by our customers and as a result the delivery of our links to it was a key objective for Scottish Widows. We are aware of the importance of eServices being provided to our customers which allows them to offer timely advice and information to their clients. Scottish Widows are committed to making it easy for Intermediaries to do business and manage their business with us"

The fastest growing 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 almost 5,000 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 compliant and fully supported.

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Editors' notes

IntelliFlo (www.intelliflo.com) has been providing Information Technology services to financial services companies large and small – including several banks and building societies – 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 is the fastest growing solution in the marketplace.