

# Press Release



9th January 2008

## **THREESIXTY PARTNER WITH INTELLIFLO TO PROVIDE SUITABILITY REPORTS**

threesixty, the fee-based IFA support services provider, has been selected by IntelliFlo, the back-office solutions provider, to supply template suitability reports on its Intelligent Office online service, as part of its online offering to 5,000 IFA users.

Intelligent Office is the UK's fastest growing Customer Relationship Management system for IFAs, with over 5,000 users nationwide.

threesixty's template reports have been used by a large number of intermediaries since 2003, and have been well regarded by both large and small firms. The reports include product-specific content, which is regularly reviewed and updated to reflect regulatory and legislative changes.

Phil Young, a partner at threesixty, commented: "A lot of time and effort goes into the reports, but Intelligent Office users need only make a few clicks to build the templates. The system automatically selects many of the relevant paragraphs based on the client's policy holdings so that the user is not presented with a long list of options, just a compliant report ready for tweaking."

Nick Eatock, Chief Executive of IntelliFlo, commented: "threesixty's reputation for professionalism and high quality compliance support gave us great comfort when launching this service. We were conscious that these reports have passed through the hands of the FSA among others, and that kind of experience and expertise is a very worthwhile investment for any business interested in protecting its value."

Tim Newman, Managing Director at Sense Network, whose advisers already use the reports through Intelligent Office, commented: "threesixty's reputation is such that you expect the reports to be compliant, but we have been impressed with how usable they are with clients."

Where we have fed back minor suggestions for improvement, threesixty have been able to make adjustments very quickly. The reports save a lot of time for everyone involved.”

**Ends**

## **Notes to editors**

### **Contact:**

Phil Young, Partner, threesixty services LLP  
[phil.young@threesixtyservices.co.uk](mailto:phil.young@threesixtyservices.co.uk)

08707 360365

Nick Eatock, IntelliFlo Ltd  
[nick.eatock@intelliflo.com](mailto:nick.eatock@intelliflo.com)

0208 481 1110

Tim Newman, Sense Network Ltd  
[tim.newman@sense-network.co.uk](mailto:tim.newman@sense-network.co.uk)

08445 768737

Georgiana Varey, Citigate Dewe Rogerson  
[Georgiana.Varey@citigatedr.co.uk](mailto:Georgiana.Varey@citigatedr.co.uk)

0207 282 2806

## **About threesixty services**

threesixty services LLP offers a fully comprehensive range of high quality support services to directly regulated IFA practices. These services include compliance support; file checking; electronic compliance manual, including mortgage and general insurance; suitability letters; technical support via a help desk, weekly newsletters and monthly seminars; business development; marketing support; assistance with sourcing professional indemnity insurance; and technology support.

threesixty delivers a bespoke, menu-based service to each client to meet their unique needs. A flexible contract arrangement enables clients to alter these services as their businesses develop.

threesixty's team of experts regularly produces in-depth market research, keeping clients up to date with industry events and product development.

threesixty services offers competitive prices and is fee-based. It does not take a percentage of its clients' commission. This makes the business model increasingly cost-effective the more business a client writes. Clients pay only for those services that they use.

threesixty was established in March 2003 and has 450 client firms and more than 2,200 advisers subscribing to its services (as at 1st December 2007).

threesixty is based at Eden point, Three Acres Lane, Cheadle Hulme, Cheshire SK8 6RL. Tel: 08707 360 360.

## **About IntelliFlo ([www.intelliflo.com](http://www.intelliflo.com))**

IntelliFlo has been providing Information Technology services to financial services companies, both 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 is the fastest growing solution in the marketplace.