

FAO News Editors



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IntelliFlo announces new integration with Zurich for automated valuation services

Leading web-based software provider to the financial services sector, IntelliFlo, is pleased to announce the addition of another new contract enquiry service. Zurich, one of the world's leading insurance providers, has partnered with IntelliFlo to provide real time updated valuations for its range of Sterling investment products, adding to IntelliFlo's established panel of quality product providers. This service is now live and available to all users of Intelligent Office.

As the system is a web based application, once users have registered individually with Zurich, all clients have access to this new service instantly without the need for user intervention. This removes the need for the IFA to manually update each terminal within their organisation, thereby saving valuable time and increasing the level of service the IFA can offer their clients.

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.

With over 5,000 users, Intelligent Office is a multi tenant and scalable solution, from single advisors to major multinationals. As it is entirely web-based, updates can be rolled out simultaneously and continuously, ensuring enhancements are delivered instantly and effortlessly.

Chief Executive Officer of IntelliFlo, Nick Eatock said, “The addition of another strong product provider to our panel means we are able to assist our partners in providing IFAs with the most efficient web-based valuation service within the Financial Services arena.”

Paul Kenmir, Zurich’s UK Life eCapability Director commented, “We are delighted to be joining forces with IntelliFlo. Intermediaries can now access real time valuations from their desk using their IntelliFlo software for the first time. We believe this latest development in the transformation of our e-capability will prove popular amongst intermediaries, making it easier for them to do business with Zurich.”

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Editor’s notes

IntelliFlo (www.intelliflo.com) 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 is the fastest growing solution in the marketplace.

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