



**To: News Editors**

**Tuesday, 26<sup>th</sup> May 2009**

**INTELLIFLO LAUNCHES POWERFUL FINANCIAL PLANNING AND FUND ANALYSIS TOOLS**

Leading financial services software provider, IntelliFlo announces the launch of its eagerly awaited Intelligent Office Financial Planning and Fund Analysis tools for investment and pension advisers. These new tools allow advisers to simply and efficiently work with their clients to tailor financial plans for future goals and forecast a range of possible strategies taking into account a wide range of considerations including current circumstances, income requirement and attitude to risk.

In a time and cost-effective way, these comprehensive new tools enable advisers to develop the plan directly with clients, thus adding real value to their client relationships. In the background, the system covers TCF requirements and ensures better compliance and reduces admin costs. There are three simple stages; **Action:** allows establishment of a plan and editing of a current client portfolio, **Execution:** committing to recommendations, thus creating new plans and updating fund data and finally, **Fund Analysis:** fund information for clients, the system will also produce the latest fund reports.

Commenting IntelliFlo Chief Executive, Nick Eatock said:

“In developing our new financial planning and fund analysis tools we have talked to a wide range of advisers to ensure our toolset is the very best on the market. In today’s tough environment, advisers need to use technology effectively to work with their clients so they can demonstrate real added value – our new Financial Planning and Fund Analysis tools enable them to do that efficiently and cost-effectively.”

The new tools have been proven to save valuable time, on average an hour per client review, so if an adviser undertakes say 10 client reviews or new client planning sessions per month this is in effect a saving of £1,500pm. In developing these new tools, IntelliFlo has worked with Towers Perrin who provide stochastic forecasting whilst fund analysis data is supplied by leading data provider Financial Express.

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**Issued on behalf of IntelliFlo by Quill PR.**

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**Editor's notes**

**IntelliFlo** ([www.intelliflo.com](http://www.intelliflo.com)) 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 1,000 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 with over 6,000 users.

IntelliFlo won the "Best Technology Software Provider" award in the Professional Adviser Awards 2007 and was Highly Commended in 2009. IntelliFlo also won the "Most Enterprising Company' Award" in the Annual UK Business Achievement Awards 2008.