



## **INTELLIFLO TRIPLES REVENUE FOLLOWING MANAGEMENT BUY-OUT**

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IntelliFlo, the independent provider of leading-edge technology solutions for financial services intermediaries, has trebled its revenue following a Management Buy-Out in December 2004. The management team has grown the business with new clients having won every major pitch for new business since taking ownership of the company. New business wins include National Australia Bank and the Principality Building Society.

IntelliFlo's Intelligent Office platform was first developed in 1998 and is now available as an advanced solution for the whole intermediary market. The system delivers a robust, scalable and flexible system for advisers across the financial services sector including national and regional IFA firms, networks, tied and multi-tied, banks and building societies and small independent advisers.

Key features of Intelligent Office are:

- Rich functionality – Intelligent Office has a comprehensive range of front and back-office features including fact find, research tools, suitability letters, CRM, workflow, new business processing, management information, compliance, risk-based file checking, document management, lead management, tasks/diaries and automated commissions management.
- Internet based – the system operates entirely on the web so there are no infrastructure, back-up or maintenance costs and regular monthly upgrades keep pace with client requests and regulatory changes.
- Proven and scaleable – the platform has been in use since 1999 and there are now over 3,500 users in a range of large and small organizations.

Nick Eatock, Chief Executive Officer of IntelliFlo, commented: “Since the Management Buy-Out we have won every major new business pitch which we believe is corroboration of the fact that the market has been waiting for a comprehensive product and service offering like Intelligent Office. The Intelligent Office platform provides everything that is required for intermediaries to operate in the de-polarised world and we are now keen to make it available across the whole sector.”

Mike Clifford, Programme Director at National Australia Bank, added: “Before choosing Intelligent Office, we conducted an intense review of 20 solutions in the marketplace. Intelligent Office proved to be the only solution that offered such a wide range of functionality together with the scale and robustness required for a large organization. The solution is easy-to-use, highly configurable and cost-effective – it will allow National Australia Bank to be one of the leading distributors in the market.”

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**Editors' notes**

**Intelligent Office** is the premier **Net Native** front and back office system for Financial Advisers. It is a totally Internet based system, so does not require the cost of additional software or hardware to run which makes it unique within the current UK Financial Advisory community. It has a proven track record in functionality, scalability and performance with thousands of users accessing the system every day.

**IntelliFlo** has been providing Information Technology services to companies large and small since its formation in 1997. Its team of dedicated IT and business professionals have collective expertise across many different markets and are highly skilled in a whole host of technologies. They have proven experience in delivering effective solutions meeting a wide range of business needs. In the last year IntelliFlo has made over 800 major enhancements to Intelligent Office and continues to deliver further enhancements to the product at a rapid rate.

Nick Eatock founded the original IntelliFlo business in 1997 and has built the company into a leading software provider to the financial services market. Nick also spearheaded the MBO of the company in 2004 enabling IntelliFlo to move to its next stage as an extremely well-funded operation providing strong enterprise technology with an impressive and growing client base. Nick is married and has 2 young children so enjoys an active family life!