



To: News Editors

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MONTPELIER PICKS INTELLIFLO'S TECHNOLOGY SOLUTION

IntelliFlo is delighted to announce that international financial advice and wealth management firm, Montpelier has appointed IntelliFlo to provide fully integrated back-office technology to its team of financial advisors and administrators. Montpelier was previously with software firm 1st – The Exchange, however chose IntelliFlo's solution for its advanced functionality following a thorough review of technology suppliers across the market.

Montpelier provides a range of financial services worldwide, from onshore and offshore tax solutions to accountancy services and investment portfolio management for high-net-worth individuals and leading corporations. As an international company, Montpelier has chosen IntelliFlo's Intelligent Office solution, to ensure that its team of 60 advisers and administrators use technology to maximise compliance control and business efficiency.

David Yelloly, Chief Executive of Montpelier stated, "We chose IntelliFlo because both its business model and technology offering are the most pragmatic solutions for our business needs. Montpelier prides itself on being adaptable and forward-thinking in order to meet our investors' needs, and we felt that Intelligent Office was the most viable technology solution for us, as it is 100% web-based and so is able to easily evolve with the ever-changing financial sector."

IntelliFlo's Chief Executive Nick Eatock commented, "We are delighted to be working with Montpelier. Intelligent Office will ensure a number of time and business efficiencies for them, including the automatic processing of commissions and the production of real time valuations. This functionality will free up the time of Montpelier's team of advisers and allow them to focus on more profitable client-facing work."

Issued on behalf of IntelliFlo by Quill PR.

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Editor's notes

IntelliFlo (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.

Montpelier (www.montpeliergroup.com) originates from the United Kingdom and is today an international name with an excellent reputation for providing a whole range of financial services worldwide, from onshore and offshore tax solutions to accountancy services and investment portfolio management for high-net-worth individuals and leading corporations. Montpelier's credentials couldn't be better, with established links with professional providers that include leading accountants, tax specialists, lawyers, banks and financial advisors; and an expertise based on two decades of service to leading professional firms who demand bespoke, cutting-edge results every time.

The Montpelier Group has been the brainchild of three likeminded men from different professional disciplines that believed in a new and quite unique concept. What has been created is a truly global financial strategy business that has taken the concept of holistic financial planning to new heights. Montpelier embraces all the attributes of a financial planning organisation but then goes so much further by bringing together a full range of professional accounting services and a dynamic international tax planning and trust business. The Montpelier Group has truly taken the concept of cradle to grave support beyond any other organisation.