



TO: News Editors

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SIFA ENDORSES NET-NATIVE SOFTWARE FROM INTELLIFLO

IntelliFlo, the only provider of net-native software solutions for financial services intermediaries, has been named as the recommended provider of client management software to members of SIFA, the support group for solicitor and accountancy independent financial advisers.

IntelliFlo are working with SIFA to incorporate SIFA's own portfolio construction and client report modules into the web-based Intelligent Office solution that is simple to use and designed to meet the needs of small and large companies with just one easily updated and modified system.

Key advantages of web-based solutions:

- Upgrades and enhancements are centralized and require no local IT resource for implementation. In the past year IntelliFlo has made over 1,100 enhancements to its Intelligent Office system, in response to client demand, all of which were automatically available to all users with immediate effect
- Implemented without any additional software or hardware and without any conflict with other programmes.
- Integrate easily with product providers' systems for electronic valuations.
- Allow for automated commission reconciliation.

Nick Eatock, Chief Executive Officer of IntelliFlo, commented:

“We have been working with SIFA to develop a system for their members that is simple to use, cost-effective and that fits in with existing business processes. Being a web-based solution, Intelligent Office requires no additional hardware or software, is easy to learn and intuitive to use. It is the ideal solution for independent advisers who need easy to use solutions to fit into their existing business processes and we aim to be the number one provider in this area.”

Leslie Sharpe, Deputy Managing Director at SIFA, added:

“We are thrilled to be involved in the design of the first net native client management software for financial advisers. Net native architecture has become the norm in the US and is now set to supersede Access-based systems here in the UK.

“We have spent a long time creating a new business process for advisers which is designed to incorporate comprehensive portfolio construction and produce FSA-compliant client reports. There is no doubt that Intelligent Office provides the ideal infrastructure for this process”.

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Editors' notes

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.

SIFA

SIFA (incorporating sIFAc) is the support group and FSA-recognised trade association for solicitor and accountancy financial advisers. Established in 1992, it provides compliance, training, research and business development support and is well known throughout the financial services industry for its business initiatives, such as Trustinvest, which are designed to assist financial advisers to work with solicitors and accountants.

SIFA believes that the ability to demonstrate the rationale for advice is key to compliance and client retention and that current piecemeal IT solutions and file-checking compliance procedures is about to give way to web-based systems which integrate business process, research and client reporting facilities.