



## Case Study Concept Financial Planning



Since Concept's formation in 2007 we have been using Intelligent Office. This partnership for our back office system has been and continues to be, a very positive decision with the RDR implementation pending. The changes that are forecast for the profession are far reaching and with IntelliFlo we can be sure of a solid position into and beyond 2012.

We can produce an accurate financial overview of the client financial situation which aids our in depth discussions with our clients on their financial planning.

We have adopted IntelliFlo's Intelligent Office system into the heart of our operation so we put as much information within it as possible as we know the system is only as good as the information inside it. This enables us to produce Management Information quickly and efficiently for commission, Treating Customers Fairly and regulatory reporting purposes. We really have joined up our thinking when it comes to business processes.

Where possible, we request that product providers feed information into the system so we are able to have up to date valuations and information on our clients plans. This also includes the current asset allocation for each plan and as a total client holding. As a result, this saves us time which is normally a labour intensive task. As time is a precious commodity to us, the facility to auto match commissions is hugely beneficial and at the moment our auto matching statistics are currently at 83% and rising, enabling us to focus on the clients not administration. We are able to make sure that we are remunerated from whichever source, providers or clients, in a systematic way.

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Paul Richardson, Managing  
Director at Concept, says:

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What we value most from the system is being able to report on everything with the client in a timely manner and the ability to have our branding and corporate colours on everything including our Client Portal. We can produce an accurate financial overview of the client financial situation which aids our in depth discussions with our clients on their financial planning.

The service that we provide to our clients is of the upmost importance and in order to benchmark our service and internal processes against an international recognised standard of best practice, the business entered into a rigorous process of assessment. We are delighted to have recently been awarded the BS : ISO 22222 Certification for Financial Planners awarded by Standards International.

The ISO 22222 is an internationally agreed benchmark that assesses and awards financial planners who can demonstrate that they have the knowledge, skills, experience and ethical values to deliver a first class service to their clients. IntelliFlo has greatly assisted with the efficiencies and business flow enabling us to clearly demonstrate what we do and how we do it.

IntelliFlo continues to improve and add new features with the consultation of many different IFAs. We have recently been testing the new Financial Planning Tool and we are eager for the launch of the second phase. We know that there are many new additions and improvements to the system due, which we welcome as we believe this shows true commitment by IntelliFlo to the market and the ability to understand and listen to professional IFAs.

We are confident that this system will continue to evolve with our core needs in mind allowing us to build our business and provide professional financial planning to our clients not only now but also for the future.

**Can we help you? T: 0845 230 3700**