

Case Study: Independent Financial Strategies



Providing the highest
standard of independent
financial advice

Clark Gillone Financial Services Ltd, who are based in Scotland, commenced trading in 1991 to provide the highest standard of independent financial advice, our aim being to deliver a comprehensive range of services including the provision of advice on Mortgages, Protection, Investment, Savings, Pensions and Inheritance Tax. Primarily, our service is aimed at establishing long term relationships with our clients and ensuring our fee and/or commission based remuneration is structured accordingly. Therefore, whether you are a new client, or one who has been with us from the start, you will receive the same quality of professional service.

We pride ourselves on providing these services efficiently, effectively and in a user-friendly way and in order to do this, we utilise the services of third parties; IntelliFlo for our technology and Threesixty Services LLP for our compliance.

Clark Gillone was recently awarded the prestigious title of Chartered Financial Planners. As a company we wanted to differentiate ourselves from our competitors and provide our clients with peace of mind that they are receiving the best advice and excellent service. There are very few such organisations in the UK and we are proud to be the largest firm in Scotland to have been accredited this status. It is a clear indication of our commitment and professionalism in ensuring that all our advisers are suitably trained and qualified in their given areas of expertise.

Clark Gillone has a fundamental belief in the benefits of technology, and recognised at an early stage that these benefits can only be fully realised by deploying a single system across the entire business. It utilises the full functionality within Intelligent Office to streamline and simplify time-consuming processes and provide full transparency across the company.

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Graham Lennox, Director at Clarke Gillone, says:

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We recognised that having all advisers within the company using the same back office system, document management and point of sale software would bring incredible efficiencies into the entire business. A common system used by the adviser and back office staff would allow effective auto-reconciliation of commissions, no-hassle visibility for case review and instant access to accurate management information. The cost savings generated would create a compelling proposition for the modern IFA.

Graham Lennox, Director at Clarke Gillone, said *"We had the opportunity to embrace the UK's leading web-based system from the outset. This offers our Advisers a multitude of benefits over the inflexible traditional options. Accurate and meaningful MI allows our Advisers to have real control of their business and also ensures TCF implementation is much easier. Providing our Advisers with itemised commissions, was labour-intensive and time consuming using our previous system, Fairs software. By using Intelligent Office we have made huge steps forward, our commission payments are accurate and easy to maintain, compliance monitoring is less intrusive and everyone has access to the information they need"*.

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Office Manager Neil James says: *"The Intelligent Office system has a massive range of features relevant to both the front and back-office. Adopting it has meant we have a single coherent system that includes Fact Find, Research Tools, Suitability Letters, Client Management, Management Information, Document Management, Lead Management and Commissions Management. As the system is centrally hosted, this ensures that all users are working from real time information regardless of location, therefore providing an exceptional service to our internal colleagues and clients alike."*

Can we help you? T: 0845 230 3700