



Case Study: In Focus Asset Management & Tax Solutions Ltd



A New
Breed of IFA
& Service
Provider

In Focus Asset Management & Tax Solutions Ltd is a well known IFA practice operating in the Southern Region. The practice provides independent financial advice for both private and corporate clients with special emphasis on helping clients to have a clear understanding of both their current and future financial position with a view to effectively managing existing and future assets, creation of capital and wealth, protection against financial risk, tax efficiency and cost effectiveness of financial arrangements.

“With our continued desire to ensure that all clients receive the optimum level of service, consistency of approach and informed advice, Intelligent Office has enabled the business to keep on top of all client activity ensuring up to the minute information at the touch of a button”. Nick Stewart, Managing Director goes on to say, “it is our Company policy not to aggressively advertise any of our services as we strongly believe that personal recommendation is a much more appropriate way of meeting new clients. Intelligent Office provides a streamlined intuitive application enabling us to provide a professional response to our clients. It has most definitely assisted with relationship management both with new and retained clients, and what’s more our IFAs can operate it remotely.”

Previously In Focus used 1st Software to process, track and audit all new and existing business. This became apparent that the infrastructure, training and maintenance costs would be too high if we were to expand. *“We knew that we needed to implement an alternative system that was more client centric and provide reporting tools that could assist in sales and administration processes.”*

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Nick Stewart,
Managing Director

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An IFA practice is unable to write business with just administrators, however, it can with just advisers, therefore adviser adoption is crucial to drive costs down. Many of our advisers work away from the office, with very little time spent with the support team to discuss changing client details or administrative tasks. Visiting the office was both time consuming and adversely impacted on potential new business opportunities. The business required an administrative system that could be operated and updated remotely by multi users. In addition, it needed the right vehicle to ensure and record that all compliance and regulation stipulations were adopted across the practice.

Following considerable research and application comparison, the business came across Intelligent Office and set about transferring the existing paper-based system into a much more integrated, streamlined and effective operation.

Since its inception in to working practice, the business has not looked back and Intelligent Office’s application has meant that we have been able to manage the growth of the business in a professional manner, maximising adviser time spent where it should be spent; with the client. Accuracy of data has improved and reporting is accessible and more efficient.

Intelligent Office has enabled accurate client information, streamlining of process, effective targeting of new business whilst ensuring that all compliance and regulation procedures are adhered to.

“We await any configuration add-ons to Intelligent Office with eager anticipation as we know that the system can only get better and better,” concluded Nick Stewart.

Can we help you? T: 0845 230 3700