

intelliflo planning

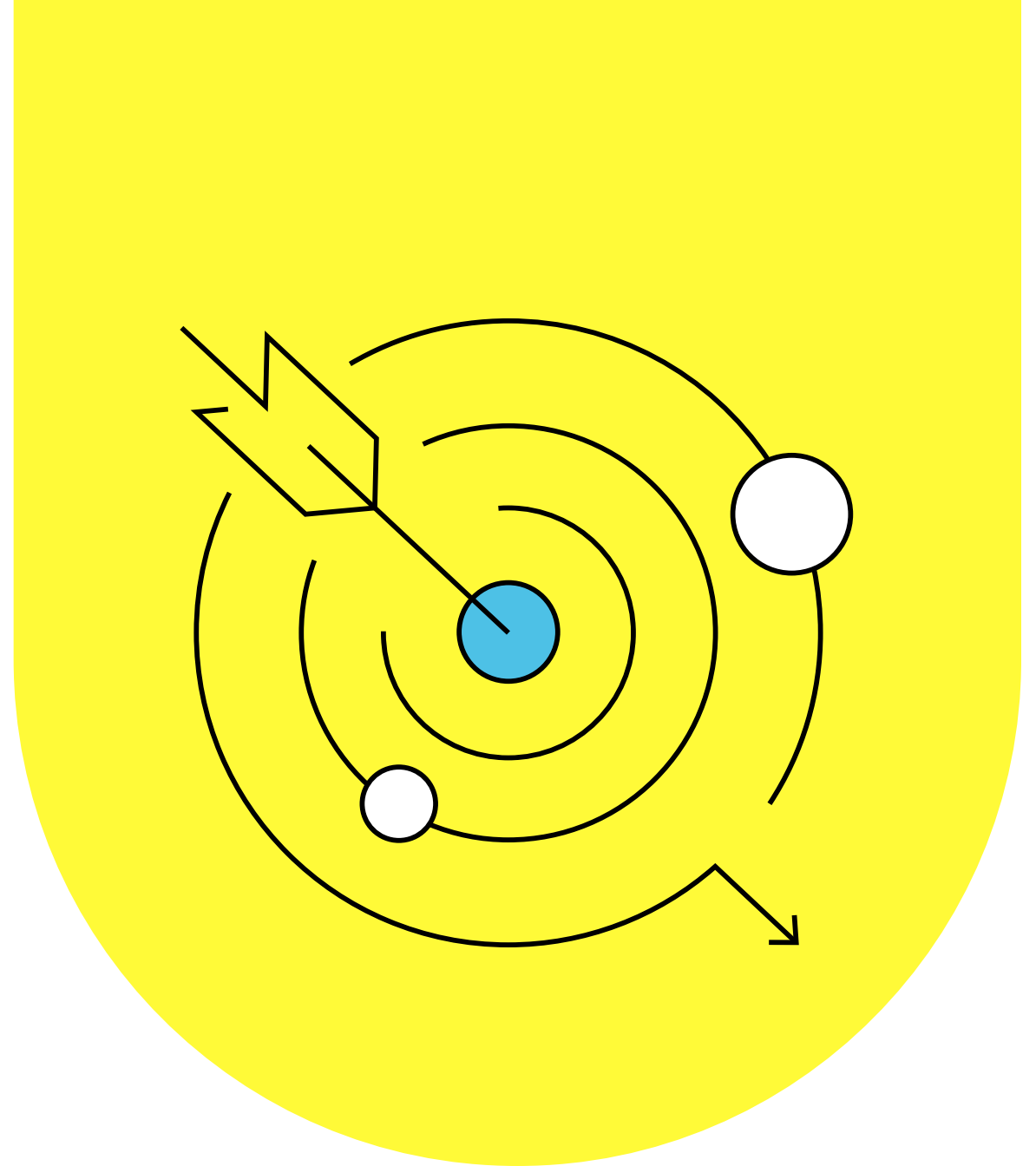
→ A powerful  
cashflow modelling  
solution

[intelliflo.com](https://intelliflo.com)



# → Introducing intelliflo planning

**intelliflo planning** is a powerful cashflow modelling solution that lets you build, stress-test and adapt client plans with minimal effort and maximum impact.





# Break down your barriers to **success**

In the UK today, there are:

**5,000+**  
financial firms\*

**27,000+**  
registered advisers\*

So, whether you're aiming to retain the clients you already have, grow your existing client numbers, or get your business in a good shape to sell it – **you're going to need a way to stand out.**

**intelliflo planning** is a powerful cashflow planning solution that can help you do just that.

\*FCA RMAR report data July 2021

# What's in it for you?

Retain clients, speed up the decision-making process and discover new opportunities

With intelliflo planning you can answer a client's question on the spot, by showing side-by-side graphs that visually illustrate how different decisions around IHT, tax and asset values will impact their plan.

This demonstrates the value of your advice, speeds up the decision-making process and brings revenue in more quickly.

Grow existing clients, attract younger clients, save time, and maximise business efficiencies

Using intelliflo planning live with tech-savvy younger clients allows them to quickly see the effects that changing certain assumptions will have on their financial life.

Completing everything live in one meeting creates massive efficiencies; firms who have adopted cashflow tools report significant growth in fees per head, clients, and referrals.

Get noticed by potential buyers, by differentiating your business with a standout USP

If you've incorporated a cashflow tool into your process, you've already set yourself apart from your peers. However, that's not enough. The real benefit comes when you use cashflow planning live with clients.

If you can do this, you immediately have a powerful USP that differentiates you from other firms.

# The proof is in the people

“

We chose intelliflo planning as it is intuitive, user friendly and has proven to have tighter integration than the cashflow modelling tool we were using before.

Stuart Harding  
FPFS FCSI MSc. Financial Planning Director  
Attivo Financial Planning

“

I watched an introduction video for intelliflo planning and then started a free trial. It hit every point I was looking at. It helps clients understand if their money will run out, and it incorporated LTA and IHT issues. Outputs are straightforward, making it easy to understand as well as engaging for our clients.

Paul Moat  
Advising Partner  
Sandringham Financial Partners

“

intelliflo planning becomes a living tool which can be updated at each client review meeting and new scenarios entered, giving the client comfort that they're on track or can afford to spend more. I've received invaluable training and the support that has been given to me has been fantastic.

Tristan Johnson  
DipPFS. Financial Consultant  
McKenzie & Co.



# Making the complex simple

Because **intelliflo planning** was designed by planners and paraplanners, they put a lot of effort into making sure it was as easy to use as possible. They also knew exactly what they wanted the solution to do for you and your end clients. That's why **intelliflo planning** offers...

→ **Highlighted plan updates** making it simple to follow the audit trail, with complete transparency

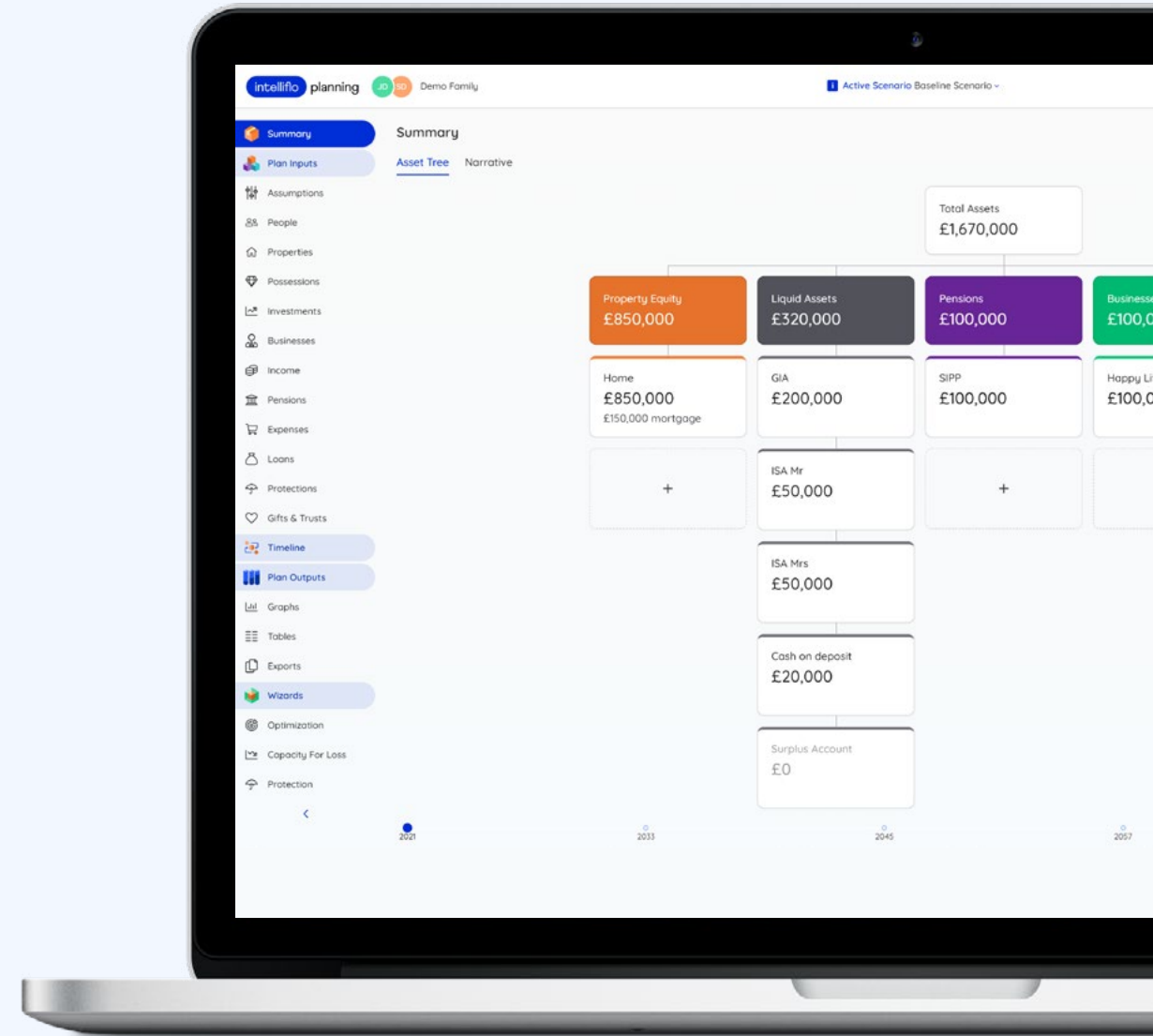
→ **Detailed tax computations** making it simple to provide swift tax calculations, displayed with clear visuals

→ **Unlimited scenario planning** making it simple to understand the impact of different strategies (side-by-side)

→ **Efficient goal analysis** making it simple to calculate client risk profiles and protection needs

→ **Simplified data entry** making it simple to increase the rate of accuracy and reduce data entry errors

→ **Fully customisable settings** making it simple to ensure consistency across all users and firms



# Countdown to **success**

When your clients see things clearly, you can move them forward confidently

1. Proven to be engaging for clients, **intelliflo planning** provides a way to initiate thought-provoking conversations that change the focus from 'financial' to 'life plan.'
2. **intelliflo planning** clearly demonstrates the value of the advice you give, as clients can visually see the impact different choices have on their life plan.
3. **intelliflo planning** illustrates how life events such as receiving an inheritance, downsizing a home, or losing a partner's pension will impact a client's wealth and lifestyle.

Effortless and enjoyable to use in your client meetings, **intelliflo planning** creates clarity and confidence, removes client inertia, and takes your client relationships to the next level.



# intelliflo planning

## Here for you

Cashflow planning doesn't have to be complicated. intelliflo planning is a powerful but easy-to-use solution that allows you to clearly demonstrate the value your advice brings.

→ [click intelliflo.com](https://intelliflo.com)

To book your free 30-day trial visit  
[intelliflo.com/uk/solutions/intelliflo-planning](https://intelliflo.com/uk/solutions/intelliflo-planning)

