



Top reasons to use intelliflo office

intelliflo office is a comprehensive, end-to-end web-based business management system for the financial services market. Manage all of your client and custodian data within a single technology eco-system and align it to your service proposition, enabling you to:

Become a lean and efficient organization

Manage risks

Build a better business



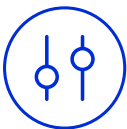
Huge time and cost savings

intelliflo office streamlines all administration processes from the initial fact find to new business submissions. Hybrid on-boarding to reduce cost of acquisition.



Protection for your business

Standardize and automate your compliance efforts.



Built in flexibility to use the tools you want

Through our 'best of breed' integrations. This list will continue to grow as we continually add integrations based on advisor feedback.



Continual updates

Future-proof your business with a system that continues to upgrade, improve and adapt to match constantly changing needs.



A single integrated 'eco-system'

intelliflo office is your front, middle and back-office system rolled into one – one place where you can seamlessly and efficiently manage your entire business. We support both advisory and brokerage engagement models.



Secure access wherever you are

intelliflo office is a web-based system, which means that all you need is a web browser and an internet connection to access your data on any device, at any time, anywhere. It's backed up constantly with high-quality data security systems.



Integrated platform that grows with you

intelliflo office is a scalable technology which works for any size business or distribution model.



Enhance your client proposition

Working hand-in-hand with intelliflo office, the new, improved intelliflo personal finance portal gives you and your clients an invaluable tool on which to view financial information and interact via a secure, online 'hub' anywhere and on any device.

intelliflo office offers end-to-end business support from client engagement to management. By providing all of these capabilities, you can spend more time on what really matters, your clients.

Engage



Prospecting



Profiling: goal-based Q&A risk profiling / suitability



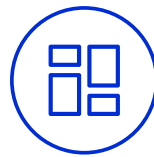
Goal plan & investment recommendation

Onboard



Account application, opening & funding

Service

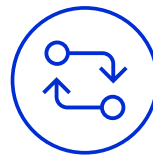


Client dashboard: progress, goals updates & service accounts

Manage



Daily portfolio reconciliation



Trading and operations



Performance reporting & billing



Home office and advisor dashboards

800-970-9080

intelliflo.com