

intelliflo office

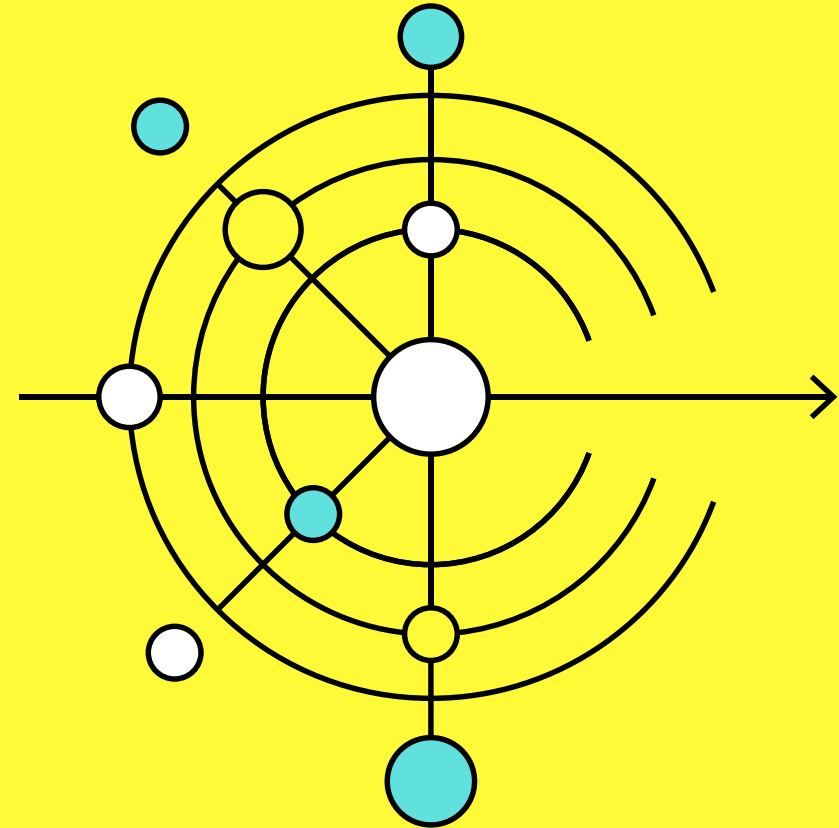
→ One powerful
system to drive your
business forward

intelliflo.com



→ Introducing intelliflo office

Tailor-made for financial advisers, **intelliflo office** is a comprehensive and flexible business management solution that simplifies your business management processes, improves efficiency, and saves you time.





Break down your barriers to **success**

Servicing existing clients, prospecting for new ones, and ensuring actions and recommendations are in line with various financial regulations takes some serious planning, thought and time.

While putting the interests of clients first is undoubtedly what makes a successful adviser, making a financial advisory business a success, is not quite as straightforward.

Whether you want to generate efficiencies, achieve growth plans, evolve for the future, give clients a more consistent and engaging experience, or have more confidence in your data – **you're going to need the right technology to support you.**

intelliflo office is an award-winning business management solution that can do just that.

What's in it for you?

Generate efficiencies and save time

View accurate FUM, without having to contact providers. Easily reconcile fees, check on valuations, policies, and client plans.

Key in data once and use it for a variety of purposes. View a client's history, with information categorised and sub categorised – and all at the click of a button.

Achieve growth plans and evolve for the future

Scale the technical backbone of your business at a pace that is right for you. Initially you may want to just automate client data feeds and income reconciliations.

As your business grows, you can select and seamlessly incorporate any of the best of breed integrations, as and when your business needs them.

Give clients a more consistent and engaging experience

Securely view, discuss, and share financial information with clients. Provide clients with up-to-date portfolio valuations, and clear visibility of their net worth.

An automatic audit trail provides peace of mind, and the white-label function means all your clients see is your own brand.

The proof is in the **people** – what our UK customers are saying

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Before we moved to **intelliflo office**, our business had four support staff to every financial adviser. 18 months later that number was one to one. Additionally, the capacity of the financial planners has increased – they can now deal with more clients than they could before.

Ian Plumpton
Chief Operating Officer
Attivo Financial Planners

“

intelliflo office enables me to reconcile fees, check on valuations, policies and plans and to communicate directly with my clients through the client portal – all in one place. It's basically pulled the whole advice process together and has really introduced some excellent efficiencies within my business.

Geoff Matthews
Owner, Director and Financial Adviser
Cansquared

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Some of our clients have been with us for 20 years, and before we had **intelliflo office** we had to look through 20 years of documentation. Documents are now attached to client records and are right there, which has massively reduced time, effort, and of course frustration!

Chirine Harb
Head of Operations
Capital Asset Management

Making the complex simple

Because **intelliflo office** was designed by advisers, 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 clients. That's why **intelliflo office** can help you...

→ **Share, confirm and submit documents** making it simple to minimise processing time and reduce servicing costs

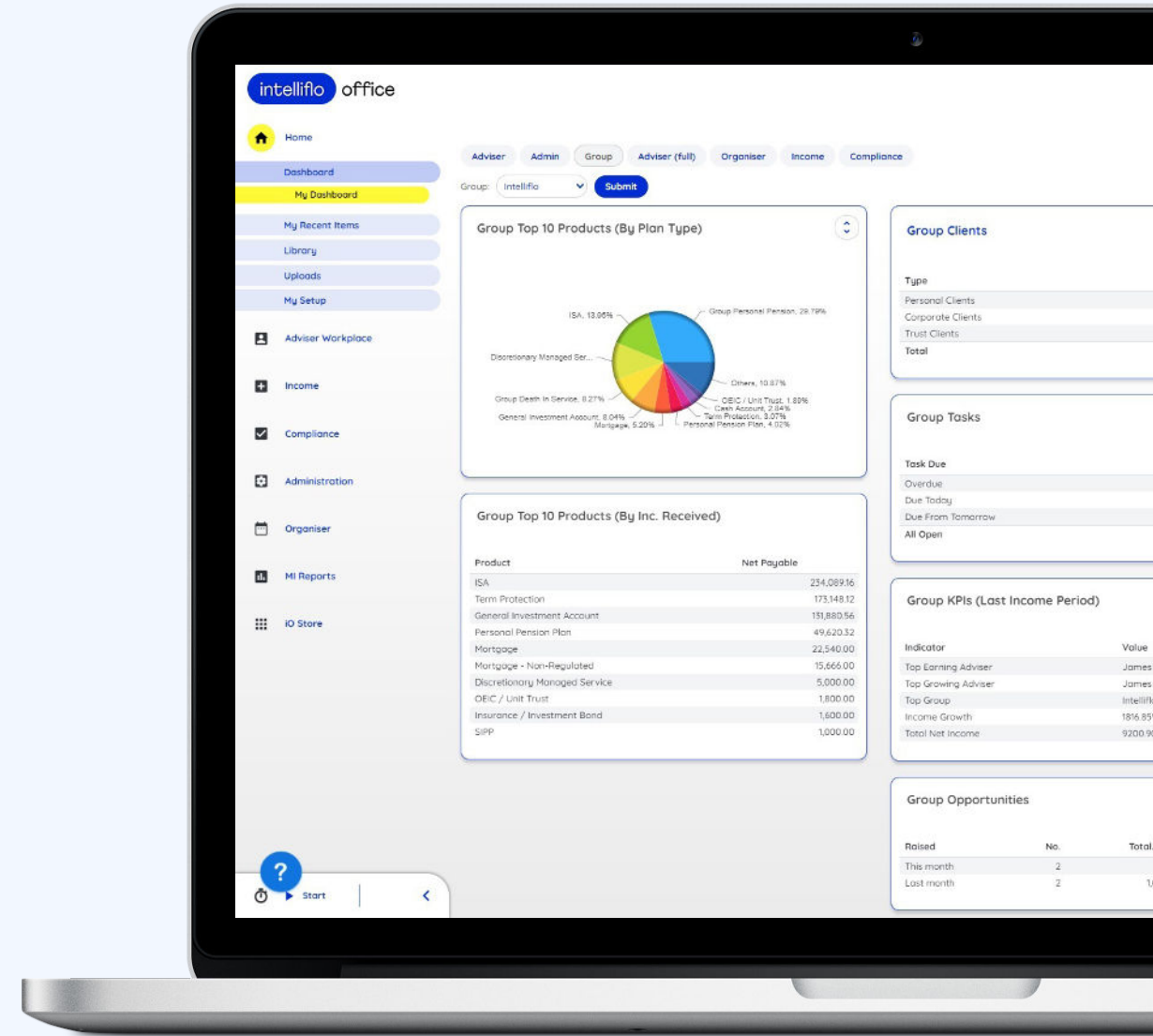
→ **Access real-time data feeds** making it simple to value your clients' holdings with automated portfolio population

→ **Collect data from multiple areas** making it simple to enable accurate and cross-referenced reporting

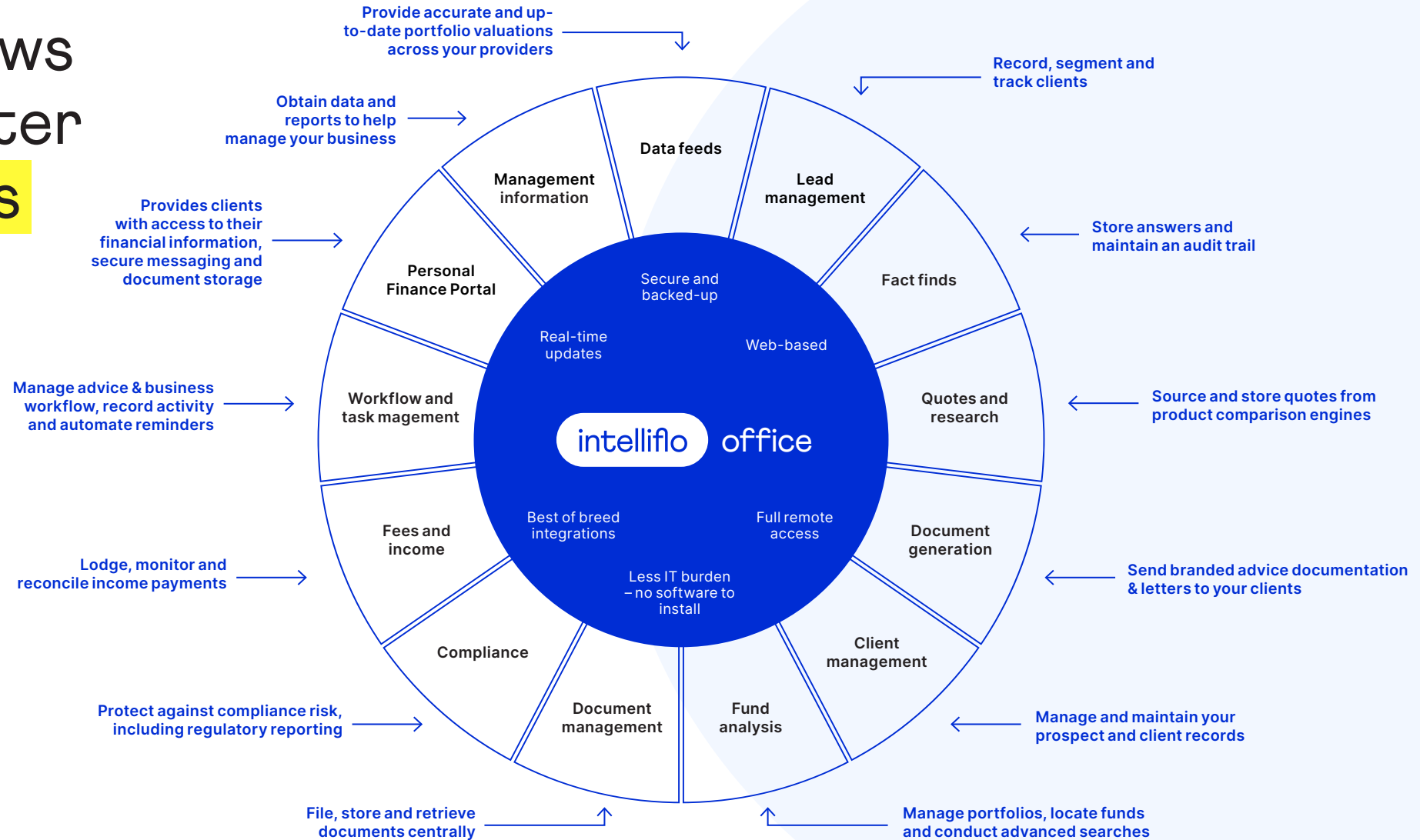
→ **Improve the quality of your MI** making it simple to have more confidence in your data to drive decision making

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

→ **Automate income reconciliation** making it simple to give clients a more consistent, engaging experience



Seamless workflows for better business



Countdown to success

One powerful system that drives your business forward...

- 1. Get started quickly.** With no software to install, all you need to do is [connect with our team](#). They'll support you with demos, data migration, onboarding and training.
- 2. You won't get left behind.** Keeping up with regulatory requirements, tax, legal and fund changes, is all taken care of within **intelliflo office**. You don't have to lift a finger.
- 3. Security built in.** Protecting your clients' data is as important to us as it is to you. **intelliflo office** is protected, secure, and validated by the ISO 27001 stamp of approval.
- 4. Perfect for any size business.** UK market leader for a reason. Affordable and effective for smaller firms, but powerful enough to support large institutional customers.



intelliflo office

Here for you

Matching your pace with the continuous evolution of intelliflo office ensures you stay one step ahead of your competition.

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

Book a demo today

