



Customer story

Ally Wealth Management



Business challenges and needs

- **Unique client profile** and business proposition
- **Desire for bespoke tools** to serve expat clients
- Experiencing rapid growth and software needed **to support that journey**
- Seeking **better dashboards and business tracking** for individual advisers
- Client demand for **expedited advice delivery**
- Growing need for **automated client and staff reports**



intelliflo delivered

- **Superior cashflow modelling**, delivering a first-class client experience
- **Positive** client feedback
- **Efficiency gains**
- **Fast** customer service response
- Consistency in **managing client experiences** and modelling touch points
- Transparent overview of team **tasks and workflows**
- A software to support **rapid business growth**



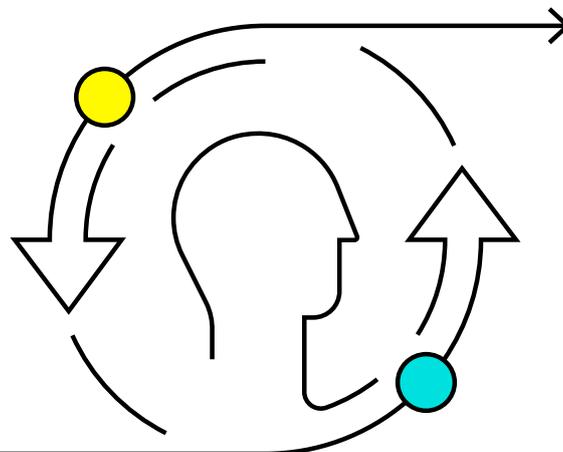
Client profile

Ally Wealth Management is a specialist Australian expat financial advice practice, providing personal, holistic financial advice to Australians, both at home and abroad.

Covering a wide range of areas from investments, superannuation, cross-border strategies, insurances, estate planning, tax planning, and more – Ally Wealth is one of just a handful of firms across the country with this specialist expertise.

Since adopting intelliflo, Ally Wealth Management has achieved champion status, scoring maximum points across key usage pillars.

This case study incorporates feedback from Ally Wealth's senior financial advisers, William Cant and Joel Kerin.



Drivers for moving to a new system

Ally Wealth has a unique client base. Many of our customers are expats, who have distinctive needs and require a bespoke approach when it comes to advice delivery.

Both here and at other firms, our team has used multiple systems, which have been sufficient for core planning for an Australian client base. However, because our clients reside all over the world, we needed a software which will help to shape and support our business profile and enhance client engagement.

Essentially, our previous software, AdviserLogic, lacked the fundamental and extra features our clients expect. These include critical planning functionality and the flexibility to input international assets and plan using a much broader, customisable position.

We were also seeking more from a user-experience perspective, for both clients and advisers. For example, while our previous system would model cashflows, the process was clunky and the final product was similar to an Excel spreadsheet you could not edit. There was no way of producing nice graphs or usable content we could share with our clients. In hindsight, there was a significant part of our previous system we didn't use, simply because we didn't have a desire to use it.

As a business, we are on a growth trajectory. To support that, we needed a more customisable ability to track client fees and revenue. We also wanted a system that would grow with us and continually enhance its offering to meet our practice's and clients' evolving needs.

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I just had a meeting and for 90 minutes we were using **intelliflo's cashflow modelling solution** to look at different scenarios... The client complimented it and said 'it's great to be able to see everything visually'. She saw significant value from that meeting. **It's an excellent client experience.**”



William Cant, Senior Financial Adviser



Data migration, customer service, and efficiency

We were early adopters in the Australian market, which meant few other local practices had experienced intelliflo. We found the data migration process seamless, but there was a learning curve involved with other parts of the onboarding process.

Throughout the onboarding process, the support team was excellent. From our point of view at the frontline, if we ask for something, it is delivered promptly.

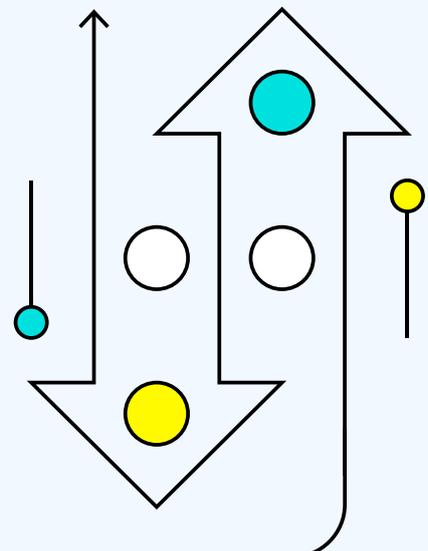
intelliflo has also created efficiencies for us in that it's allowed us to use one solution across our entire business. Speed is everything for us, so it's important over the longer term to be able to streamline our processes.

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Our client base now **wants more, expects more, and deserves more**. The cashflow modelling solution intelliflo offers has been an important way to deliver that.”



Joel Kerin, Senior Financial Adviser



Delivering a new client experience

The feedback from our clients has been positive. I just had a meeting and for 90 minutes we were using intelliflo's cashflow modelling solution to look at different scenarios. The client, who had sold her business, expressed interest in buying a property but was uncertain when she would work again. We sat there and I ran scenarios which allowed her to visualise the impact of different options. In the end, the client complimented the software and said 'it's great to be able to see everything visually'. She saw significant value from that meeting. It's an excellent client experience.

intelliflo's cashflow modelling solution is also user-friendly for us. As an adviser, you are no

longer spending ten minutes having to play with the software before you can show clients potential scenarios. I remember with other providers, I had to turn my screen around and make changes and then turn it back around for the client to see. With intelliflo office, I share my screen and they can see the live process. It's simple and it's fast.

Several of our clients have registered for the client portal and some did so almost instantaneously when they were able to. Over time, we expect the uptake of the client portal to continue to grow, especially for clients who prefer a visual representation of how their wealth is tracking.

Supporting our growth

Ally Wealth is experiencing rapid growth and is becoming a well known name, especially among expats. intelliflo supports our ability to meet our end goal, which is to become the top provider of wealth advice to expats.

Through intelliflo, we can also showcase to prospective local and international clients what we offer. Clients love hearing other peoples' stories and in future, we expect to use intelliflo to show how we have helped our client base and plan to support others in future.

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