

intelliflo sub-processors (all regions) Last update: August 2025

Intelliflo engages vendors in the provisioning of services and to support the operationalisation of our software. In the context of privacy and data protection law, vendors providing such services to us are defined as ‘sub-processors’ and must act in accordance with our instructions.

Below is a list of these vendors and the scope of their services.

Vendor name	Vendor address	Key Activities	Do they store data?	Can they access data?	Vendor location
Amazon Web Services, Inc (AWS)	1 Principal Place, London, Worship Street, EC2A 2FA	Computing, storage, and other application services	Yes	Yes	UK, EMEA
Certua	12 - 18 Theobalds Road, London, England, WC1X 8PL	Software development, support	Yes	Yes	UK
eValue	Benyon House Newbury Business Park, London Road, Newbury, Berkshire, RG14 2PZ	Financial planning solution that includes various planning tool-based capabilities. When customers use this integration, the customers' data will be sent to eValue's facilities for processing and storage.	Yes	Yes	UK
Glia	Viru väljak 2, 6th floor, Tallinn, Estonia, 10111	This service allows customers to co-browse with their clients and communicate via text, audio, or video. To aid with MIFID ii compliance, Glia records all browsing and communications which means that any documents shared, or discussions had will be recorded and stored by Glia. Glia is a US company however the service they provide to intelliflo is based in EEA. Any recordings are therefore stored in EEA.	Yes	Yes	US, EMEA
Godel Technologies	9th Floor, NEO Building, Charlotte Street, Manchester, M1 4ET	Software development, support	No	Yes	EMEA
Implicit	Implicit, Inc., 1159 Sonora Court, Suite #305 Sunnyvale, CA 94086, USA	Provides an outlook integration to allow emails to be uploaded into intelliflo office for clients and leads.	Yes	Yes	APAC, US, EMEA

Inscale	INSCALE, Symbion Fruebjergvej 3 DK-2100, Copenhagen Ø Denmark	Software development	No	Yes	EMEA
Mailchimp	675 Ponce De Leon Avenue, Northeast Suite 5000 Atlanta, GA 30308 USA	When customers use the intelliflo office mail campaign functionality this leverages the Mailchimp delivery service	Yes	Yes	US
Maytech Communications Limited	4 Mount Ephraim Road, Tunbridge Wells, Kent, United Kingdom, TN1 1EE	Secure data transfer solution (Quatrix)	Yes	No	EMEA
Microsoft	Microsoft Campus, Thames Valley Park, Reading, RG6 1WG	Provide the Operating Systems for servers & databases. The underlying storage for SharePoint and OneDrive.	Yes	Yes	APAC, US, EMEA,
Open Text	Department Prof. E.M. Meijerslaan 1 1183 AV Amstelveen The Netherlands	Providers send lump sum advisor fees to an OpenText-hosted inbox. intelliflo processes the data and saves it into the intelliflo office database, which is used by firms to allocate fees to the correct advisors.	No	Yes	EMEA
GB Group	Waterside, Basin Road, Worcester, WR5 3DA England, United Kingdom	This service allows customers to verify addresses. To enable this service to work it is necessary to share some details about the client's address, specifically house number, and postcode.	No	Yes	UK
Snowflake	Riverbank House, 2 Swan Lane, London, England, England, EC4R 3TT	Warehouse technology, development, support	Yes	Yes	UK
WalkMe Limited	WalkMe UK Limited, Mazars. 30 Old Bailey, London, United Kingdom, EC4M 7AU	A Digital Adoption Platform and learning tool.	Yes	Yes	APAC, US, EMEA
Yodlee	Envestnet Yodlee 621 Hillsborough St, 9th Floor Raleigh, NC 27603	Provides financial data aggregation, analytics, and account verification services for open banking.	Yes	Yes	APAC
Zoom	Lionheart Squared Limited, 17, Glasshouse Studios, Fryern Court Road, Fordingbridge, Hampshire, SP6 1QX, United Kingdom	Provides video conferencing, online meetings, and messaging services for seamless virtual collaboration.	Yes	Yes	APAC, US, EMEA

Updates to this page

As part of our continued drive to deliver premium services you have come to expect from using our platform and services, and pursuant to our notification obligations under applicable data privacy laws, this communication will serve as notice that we have decided to **engage** the following new subprocessor/s.

Vendor name	Location	Scope of Services
Implicit	APAC, US, EMEA	Provides an outlook integration to allow emails to be uploaded into intelliflo office for clients and leads.
Microsoft	APAC, US, EMEA	Provide the Operating Systems for servers & databases. The underlying storage for SharePoint and OneDrive. Teams is also provided by MS along with many Security & ancillary products.
OpenText	EMEA	Providers send lump sum advisor fees to an OpenText-hosted inbox. intelliflo processes the data and saves it into the intelliflo office database, which is used by firms to allocate fees to the correct advisors.
WalkMe Limited	APAC, US, EMEA	A Digital Adoption Platform and learning tool.
Yodlee	APAC	Provides financial data aggregation, analytics, and account verification services for open banking.
Zoom	APAC, US, EMEA	Provides video conferencing, online meetings, and messaging services for seamless virtual collaboration.

We have decided to **offboard** the following vendors

Vendor name	Location	Scope of Services
Datavail	US, India	Offboarded.

For detailed information about the subprocessors' privacy practices, please refer to:

[Implicit](#)
[Microsoft](#)

[Open Text](#)
[WalkMe Limited](#)
[Yodlee](#)
[Zoom](#)

Notification of changes

Queries should be directed to dataprotection@intelliflo.com

Vendors accessing intelliflo's cloud-based SaaS environment

Intelliflo have put specific processes in place to govern and monitor vendors requesting access, what they are requesting access to, why they need access and for how long.

In addition, there are specific technical controls in place to ensure that personal data cannot leave the control environment regardless of the member of intelliflo's personnel or the location they are accessing from.

Additionally, intelliflo has implemented technical controls in its corporate environment to ensure that personal data is not arriving from intelliflo's cloud-based SaaS environment. The controls applied to the Approval Process is as follows:

- Workflow driven which forms requesting details such as scope and rationale.
- Mandatory approval is required from Line Manager or Cloud Operations Engineer.
- All access requests both approved and rejected are tracked and audited.
- All access is time limited - default is 8 hours.
- All access is based on least privilege and so is limited in scope to what is required whenever possible