

intelliflo

CUSTOMER STORY

# ASO Wealth

## Client profile

ASO Wealth is a Sydney-based practice with a mission to provide holistic wealth management advice and tailored services that deliver outcome-based solutions.

As a self-licensed firm, they place the client's individual needs and circumstances at the heart of everything they do. With 20 years of combined experience, their directors and financial advisers, Julien Renard and Nazar Pochynok, deliver tailored advice for family groups, self-funded retirees, high-performing executives, ultra-high net worth individuals and successful entrepreneurs.

They shared their story and experience with intelliflo:

We thought, 'Who can we partner with now who will help us look five years' ahead?' That obviously led us to intelliflo, who was also thinking progressively and taking on the challenges of scale and tech.

- Nazar Pochynok

## Supporting our self-licensing journey

To achieve our goals of being truly client-centric, we knew we had to become self-licensed and needed a technology partner who could support us. Through a previous organisation, we had the opportunity to experience five different CRMs and see all the 'shiny new toys' the industry was offering.

However, for us, it was important to **find a partner who could help us achieve what we wanted to**, which was being able to deliver holistic advice. Before becoming self-licensed, we had AFSLs try to scare us with talk of compliance and high costs. However, after speaking to our compliance management team at My Dealer Services, we got a completely different picture. It was the best decision we made because now we truly have the freedom to stand by our values and deliver advice the way we want to deliver it. Transitioning to self-licensing also meant taking greater responsibility for operational efficiency and client communication. Rather than building processes manually, we wanted a **technology foundation that could scale with the business from day one**.

Having a system that supported structured workflows, documentation and reporting was critical to ensuring advice quality remained consistent as the firm grew.



## Business needs and challenges

Technology to support holistic, product-agnostic advice delivery.

A strong desire to build trusting, long-term client relationships.

Reduce admin burden, enabling advisers to focus on strategy.

A technology partner with a vision for the future, not just the present.

Secure digital communication to safeguard sensitive client data.



## intelliflo delivered

A smooth onboarding process.

Powerful cashflow modelling tools to strengthen client trust.

A secure client portal to remove reliance on Outlook.

Templates to support a non-aligned, self-licensed business.

Scalable infrastructure to support business growth.

## Our wish list and how intelliflo met it

“We were prescriptive about what we needed from our CRM. We didn’t want to go back to a world where we had to rely solely on humans. When we launched the business, we had no existing client base, so we needed an onboarding process that was efficient and scalable from day one.

We also knew we needed a system that could produce compliance documents, such as statements of advice (SoAs) and records of advice (RoAs), so we didn’t have to sit there and build new things. A lot of other CRMs told us, “You’re self-licensed, so you actually need to give us your SoA wording”. We said we don’t want to spend time doing that; instead, we want to invest our time in advice delivery.”

With our strategic focus, we also needed strong modelling capacity to be able to showcase our advice. However, with intelliflo, I think the biggest benefit was the client portal because it meant we didn’t have to put together fact finds. The portal was far more efficient, robust and secure.

From a cyber-security perspective, we didn’t want any documents shared on email. We didn’t want a scenario where someone had their information compromised. With the portal, from day one, we were able to say, “please use this secure link and upload your information here – it’s for your protection and my protection”. It was a major point of difference for our business.

## Helping us to build client trust

As a holistic practice, trust is everything. intelliflo, along with their integration partners, supported a solution that allowed us to turn our data into projections and modelling to get our clients to the point where they can have an informed view and confidence about the critical decisions they are making.

At the end of the day, our role is to make clients’ lives as simple as possible and intelliflo helps by keeping processes simple. From 180 clients, we have 102 registered on the online platform. [Under a previous CRM], we used to have 250 clients and 10 would be registered and it would be a hard ask.

We’d be lying if we said intelliflo wasn’t a massive part of our current success.

- Julien Renard

## Becoming the gold standard

Our goal is to become the gold standard of strategic, unbiased advice. We want to be what people think of when they are looking for truly independent advice. I think the seeds of that philosophy were planted at the very beginning of our journey. We said, “we’re going to build a platform in which you can plug and play different providers because the tool of today is not going to be the tool of tomorrow; it’s going to be constantly evolving as peoples’ needs change.”

The key to meeting those goals is being super adaptive. As long as intelliflo is looking to build on their offering, that’s how they’ll meet the goals of our clients, ourselves and the broader industry.

intelliflo passed the family test. My family said, ‘Well, this is fantastic, I love this’. You know your family are going to be the most honest people.

- Nazar Pochynok



**Julien Renard**

Director & Founder  
Financial Adviser



**Nazar Pochynok**

Director & Founder  
Financial Adviser

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for yourself

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