

intelliflo

→ Welcome to integrated model portfolio service (IMPS)

March 2021

intelliflo.com



Introducing integrated model portfolio service (IMPS)

→ Powered by us
controlled by you

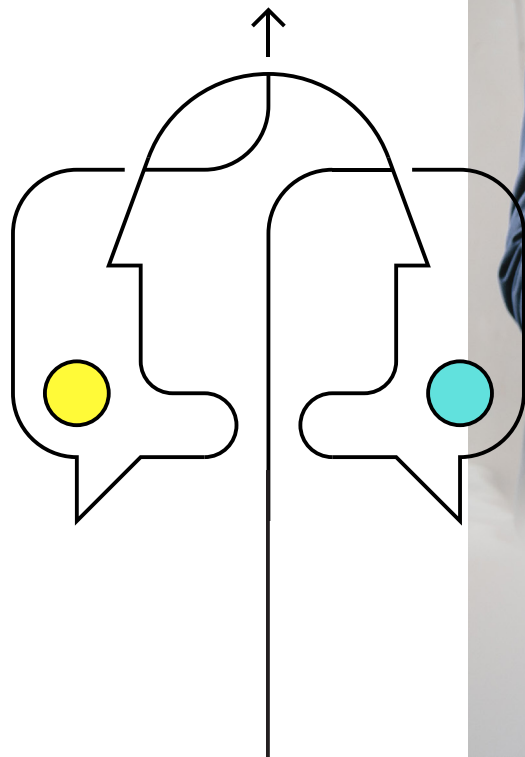
A seamless investment solution, powered by us, and controlled by you.

An alternative to traditional Centralised Investment Propositions (CIPs), our IMPS simplifies investment portfolio management, reduces friction in the advice process and helps you take control of your client's advice journey.



The benefits

- Driving client engagement
- Simplifying your client fees
- Rebalancing quickly and easily on a regular basis
- Accessing a full audit trail via intelliflo office



Control, transparency and risk have been regulatory buzzwords of the post-crisis financial services industry.

How can financial advice firms take full control of their client's journey, provide overarching transparency of the process and the fees, whilst keeping on the correct risk path? IMPS is set to revolutionise how advice firms service their clients.

For financial advisory firms that are looking for an alternative to traditional outsourced investment solutions, IMPS enables them to deliver a seamless investment experience including regular model rebalancing and professional portfolio commentary.

This enables financial advisory firms to work smarter and offer a better customer experience at an effective price. Unlike traditional outsourced investment solutions, IMPS is the only offering in the marketplace to deliver a fully adviser-branded offering with these efficiencies to customers.



Key features

→ Drive client engagement

With IMPS, there will be no confusion over who is in control of your client's advice journey – you are. A fully white labelled solution, with expert market commentary included, you will be in a strong position to increase client engagement and touch points, without the need to increase meeting and administrative phone calls.

→ You're in control

You select the model provider from the intelliflo marketplace. This means that you retain control over your client's advice process and remain the central point of contact.

→ Rebalancing made easy

Keeping client investments in-line with their attitude to risk and reducing portfolio drift is crucial. With IMPS, where the need for rebalancing is identified, a message is automatically generated and sent to the client for their approval of the process.

→ Reduce friction in your advice process

Processing, servicing, administering, meeting, explaining, approving... all of these take time out of your business without necessarily adding value to your clients. IMPS does this automatically, making your service more straightforward.

→ Simplifying your client fees

Client charges in the advice space can still be somewhat opaque, but IMPS brings everything back under your control, simplifying your service charges. Clients do question why they don't just go direct to a service provider and avoid adviser fees once it has all been laid out to them – so take back control of their advice journey and demonstrate your full value to them.

→ Access a full audit trail via intelliflo office

All of the information, correspondence and advice is stored against the client record in intelliflo office, meaning that you have a complete audit trail and up-to-date information. Furthermore, with intelliflo personal finance portal you can portray this information to your clients in real-time, too. You have complete administrative oversight of the entire process.

IMPS network

Model portfolio providers (MPP)

Selected by you to best fit your client's needs. The MPP provides market commentary, schedules model updates and issues performance and reporting requirements.

personal finance portal

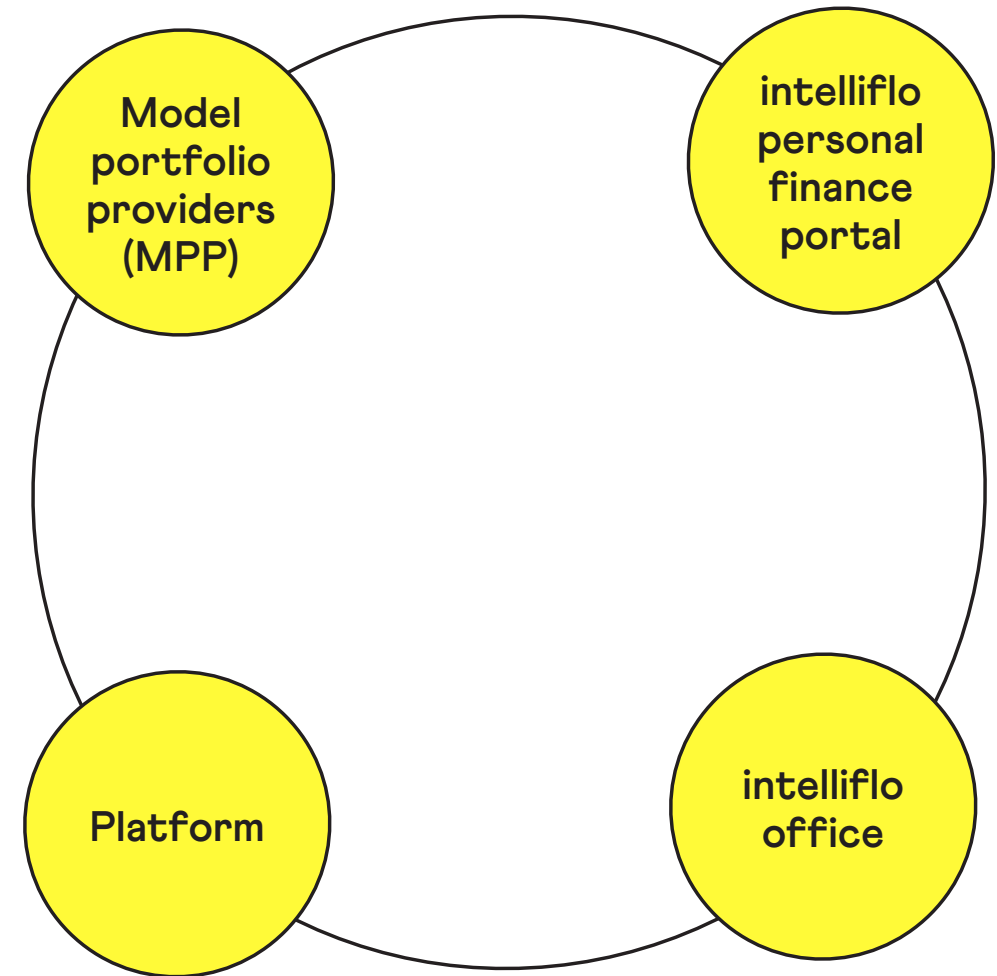
Secure communication between you and your client for the facilitation of the IMPS process with all supporting client documentation and a gateway for your client to access their information.

Platform

The custodian which processes all of your IMPS transactions.

intelliflo office

Your central hub, storing all of the client's information, tolerances and their entire financial planning roadmap. IMPS streamlines the rebalancing and MPP updates for you.



intelliflo

Here for you

Our new unified approach gives us enormous reach and capabilities that can better meet your demands. We'd love to speak to you about how we can help provide more for you, your team or your clients.

→ **call** 0330 102 8402

→ **click** intelliflo.com

→ **email** info@intelliflo.com

