

intelliflo office

Welcome to  
→ intelliflo office

intelliflo.com



Introducing intelliflo office

# Free up time to focus on → your business

Managing a business is hard work – but intelliflo office can save you time, money and stress.

Whatever the size of your firm, intelliflo office provides a streamlined business management system tailor-made for financial advisors.

Accessible from anywhere, our software simplifies office management, improves the client experience and allows you to focus your efforts on growing the business.

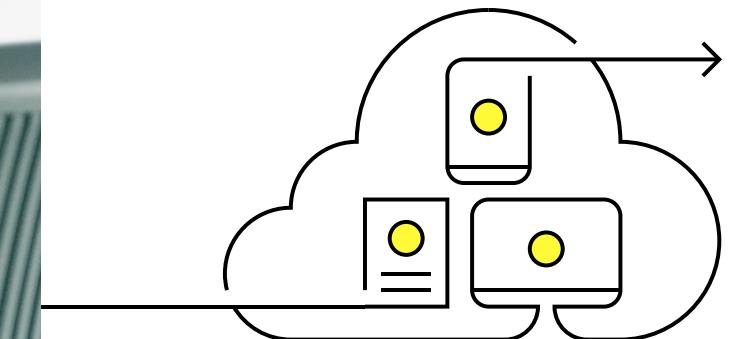




intelliflo office

## One powerful system to drive your business forward

The financial advice sector is changing. More and more consumers are demanding access to products and services online, whenever and wherever they need it. So how can successful firms evolve to keep step with these changing needs?





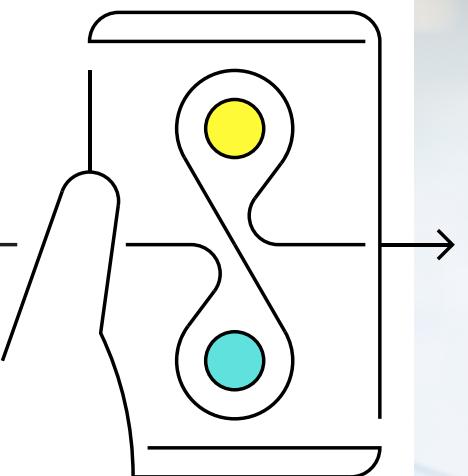
Using intelliflo office has brought us into the 21st century and has opened our eyes to new opportunities and new ways of carrying out and improving our business.

Abbie Buss  
Operations manager,  
Grosvenor Wealth Management

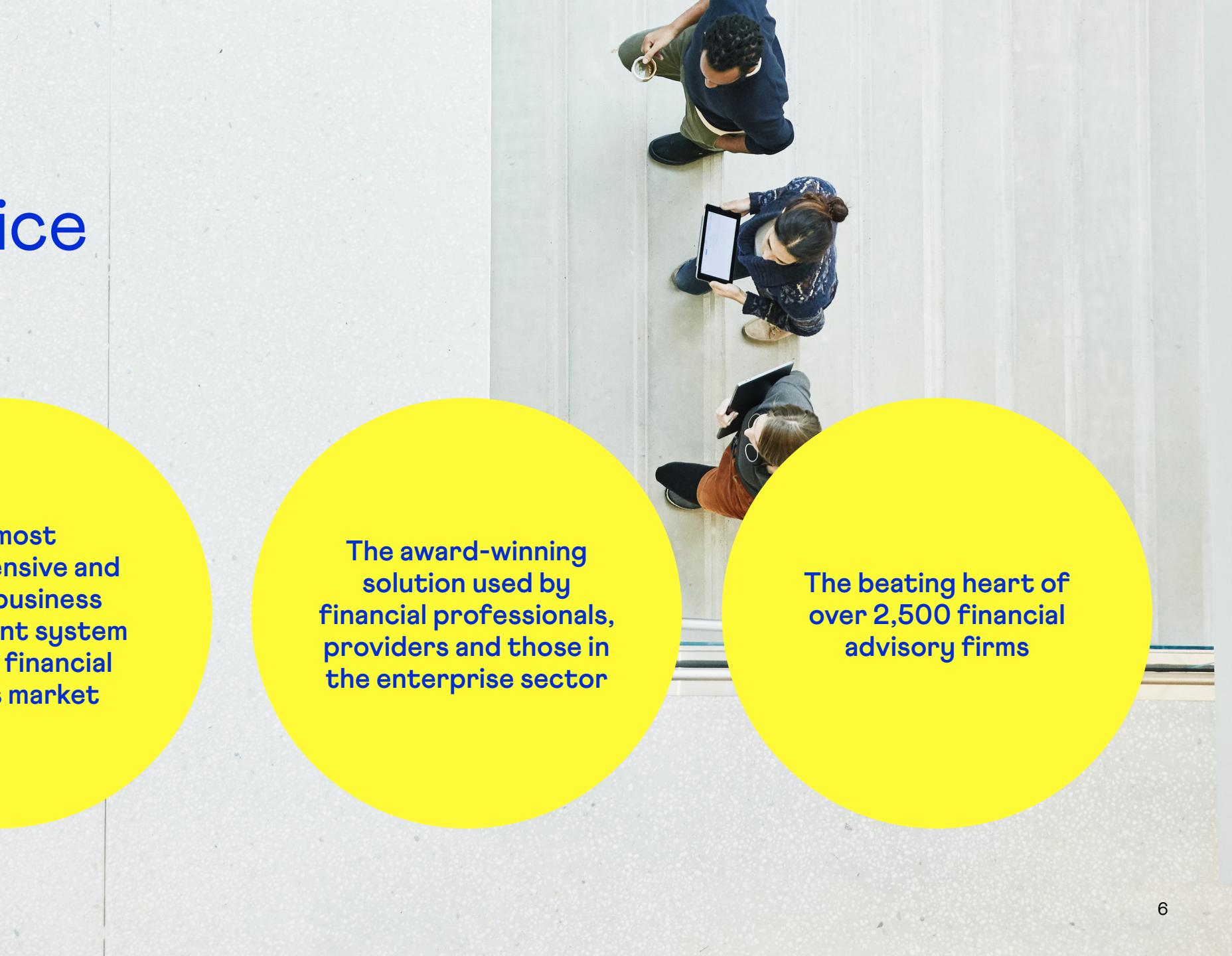
## The benefits

As well as providing clients with easy online access to your services, intelliflo office lets you streamline the entire advice process, giving you more time to focus on your client relationships.

- Reduce your costs and enjoy the convenience of 24/7 remote access
- Save time by managing the entire advice process via one user-friendly system
- Key in your client's data once and use it for many different purposes
- Scale to suit the size of your business
- Integrate the tools you use most via the intelliflo store™, showcasing 100+ 'best of breed' platforms, product providers and more



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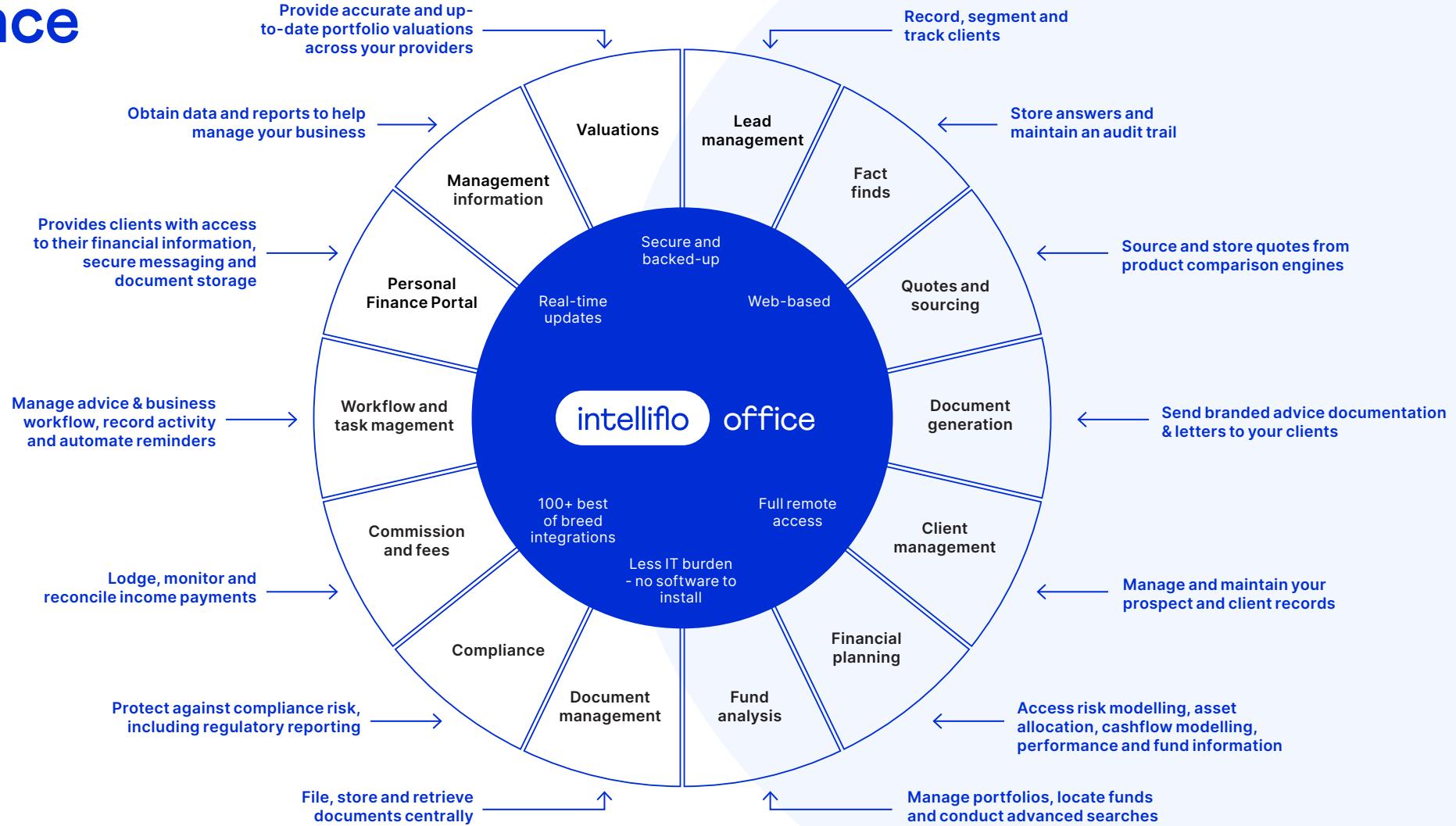


The most comprehensive and flexible business management system in the UK financial services market

The award-winning solution used by financial professionals, providers and those in the enterprise sector

The beating heart of over 2,500 financial advisory firms

# intelliflo office – at a glance



## FAQs

**Are you paying extra to use an income and fee reconciliation module? With intelliflo office there's no extra charge.**

At intelliflo, we understand how vital accurate income and fee reconciliation is to your business, especially in light of the enhanced RMAR reporting requirements. That's why our industry leading income and fee functionality is included as standard within intelliflo office (intelliflo office), after all this should form the basis of your back office proposition.

**How do you gather information for your Gabriel returns? With intelliflo office the process is seamless.**

Due to the integrated nature of intelliflo office, data is available from multiple areas of the solution to enable accurate and cross referenced reporting in a pdf format. So the RMAR report can be produced in a user friendly format directly from intelliflo office. What's more, you will be able to access detailed analysis of the data within the RMAR report, section by section, in a CSV format.

**How do you value your client's holdings? Obtaining valuations through intelliflo office is as easy as abc.**

If you still value policies on a case by case basis and over the phone, intelliflo office can transform your business - saving you time and money. intelliflo office supports over 85+ of the largest providers for real time valuations returning information not only on the value of the client contract, but also an update on the number of units for each fund within a plan. Once this information has been returned, it will automatically populate into your client's portfolio report.

**Would you like to cut the cost of communicating with your clients and give them secure access to their financial information online? With the personal finance portal it couldn't be easier.**

Working hand-in-hand with intelliflo office, the personal finance portal (PFP) makes servicing your clients cheaper by saving processing time, postage and printing costs. This invaluable solution offers you and your clients the ability to securely view and share financial information online, provide up-to-date portfolio valuations and see their total net worth, by incorporating their bank account, credit card and non-advised financial products. PFP can be white-labelled to reinforce your brand and it helps you meet regulatory and data protection demands.

PFP is available across device, on desktop, laptop, tablet and mobile phone so you and your clients can have information on hand at any time.



# intelliflo office

## 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](http://intelliflo.com)

→ **email** [info@intelliflo.com](mailto:info@intelliflo.com)

