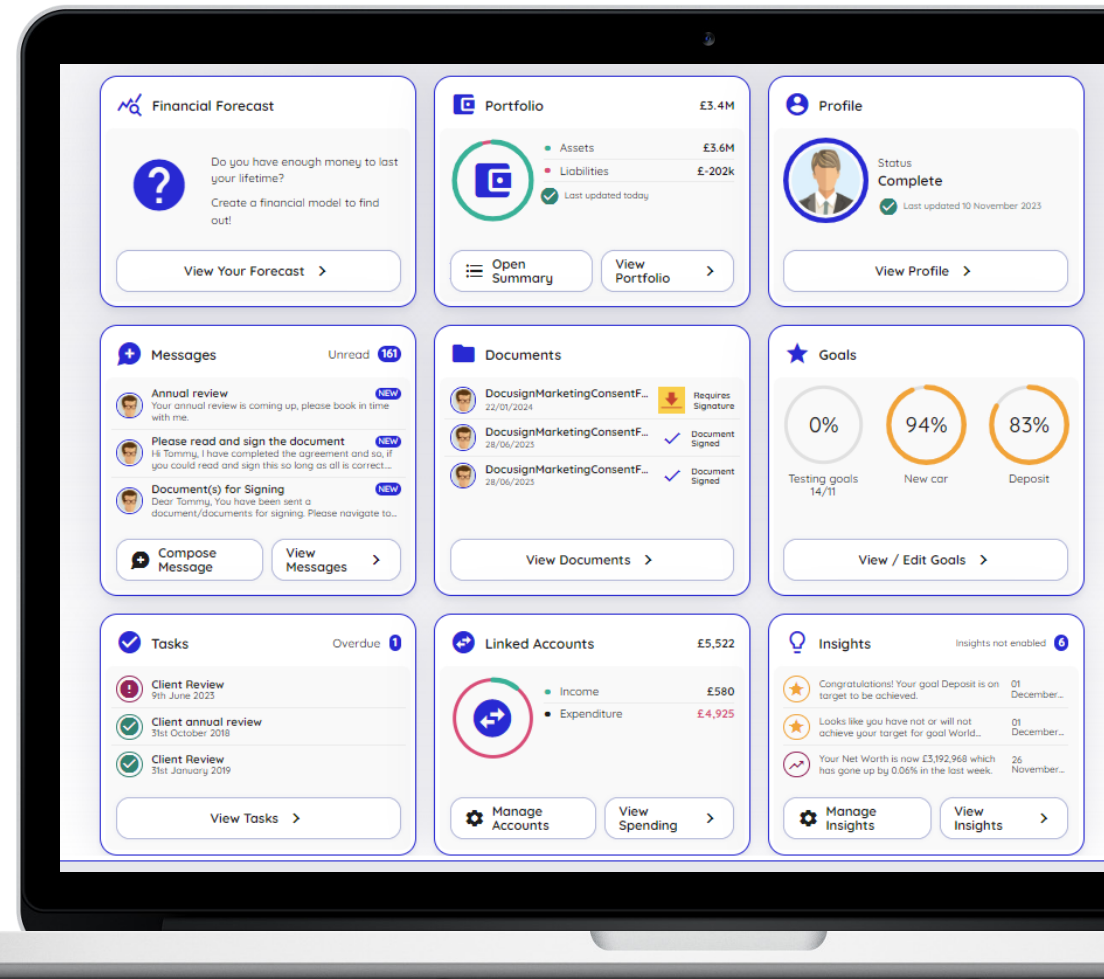
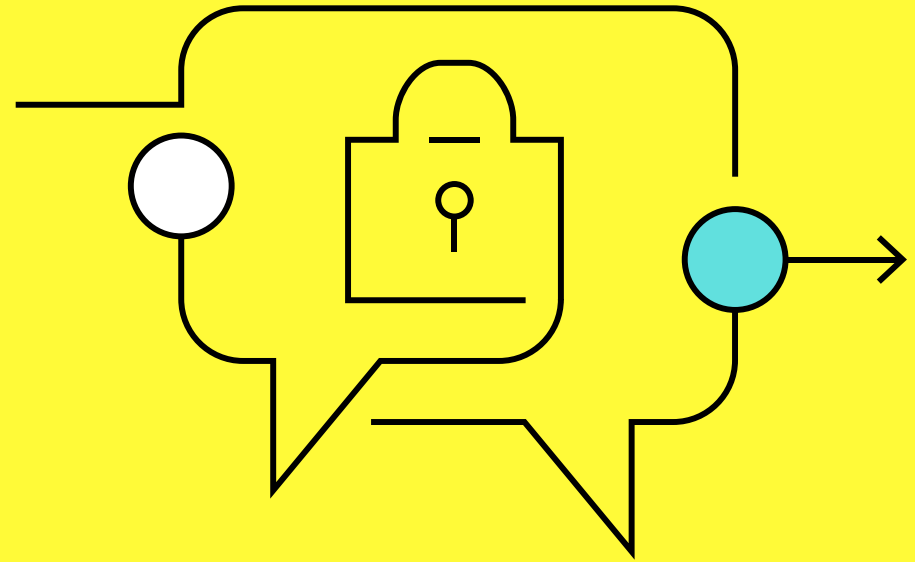


→ intelliflo
client portal

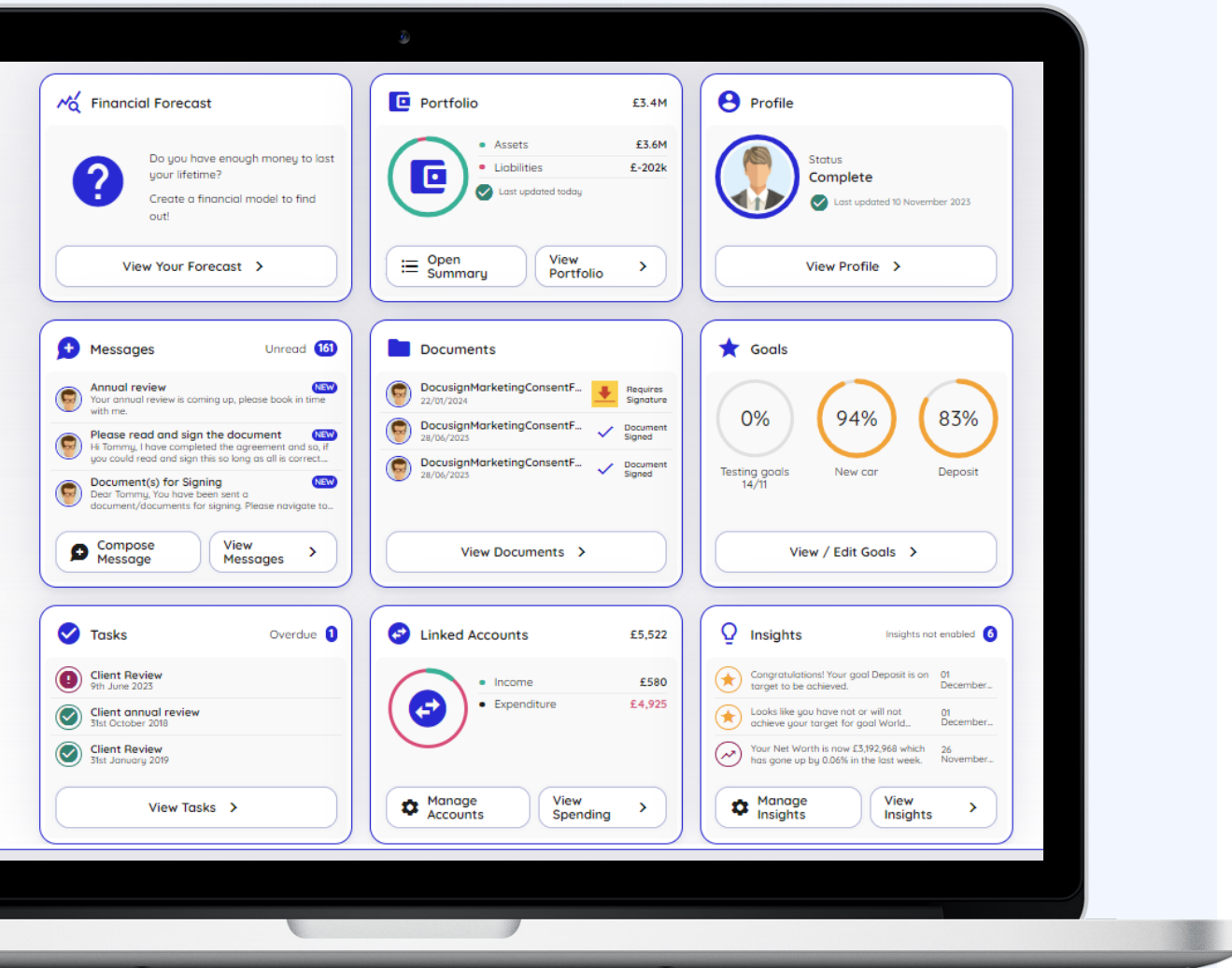


→ Securely grow your client relationships

From onboarding and fact finding, to secure virtual meetings and paperless document sharing, our client portal provides an **efficient and engaging** advice experience.



Break down your barriers to success



The right digital tools can help you and your business become more efficient. They can also redefine your clients' experience. Research shows that consumers of all ages are now actively choosing to interact with their advisers online, and often outside of traditional '9-5' office hours. Clients increasingly expect to be able to engage wherever, and whenever they want.

intelliflo's intuitive client portal is more than just a 'portal' - it's a **modern, personalised extension of your advice process**, accessible as a web app at any time, and from any device.

What's in it for you?

Faster, more secure engagement

Fully integrated with intelliflo office, intelliflo's client portal gives you and your clients a secure shared resource where you can communicate any time, from any device, while offering your clients a bird's eye view of their financial information and the value you're adding.

Aggregate your clients' financial picture

Provide your clients with a holistic financial overview by combining their data stored in intelliflo office with their cashflow information captured via the client portal. Our fully integrated financial forecast app is specifically designed to engage your clients with their life goals. Simple, yet powerful visualisations give them insight on how to better plan for their financial future. With the advent of Open Banking, your clients can link supported bank accounts, credit cards and savings accounts, to show up-to-date account balances and better understand their financial position.

Maximise access on all devices

intelliflo's intuitive client portal enables your clients to review and self-serve their portfolio at the touch of a button. Accessible via a fully integrated Progressive Web App (PWA), which means you and your clients can engage seamlessly on any device with a web browser, safe in the knowledge that you're always using the very latest version.



What's in it for you?



Save time and cut costs

Our fully integrated client portal enables you to share, sign and return documents online on the same day, minimising processing time and reducing your servicing costs. Save time at the outset of a new client relationship by automatically pulling bank account information into the intelliflo office fact find before the client meeting.

Meet compliance and regulatory demands

Discuss and share information confidently with your clients, safe in the knowledge that an audit trail and all documentation are automatically stored securely. Secure messaging via a client portal can help firms comply with the Consumer Duty regulation as well as data requirements under GDPR & MiFID II. Important documents can be instantly shared with your clients, with a login required to access them.

Grow your business and reinforce your brand

Easily merge client data from intelliflo office and intelliflo's client portal, to deliver a cost-effective marketing and communication mechanism to engage your clients en masse. You can also apply your logo and colours throughout for brand consistency, and configure the dashboard and widgets on a client-by-client basis

The proof is in the people

“

Clients expect to interact with things at their own convenience and at a time that works for them. They want to see and feel what's happening now, as opposed to getting an update every six to 12 months. And they want information to be presented to them in a user-friendly way. The client portal allows us to do all this, supporting stronger client relationships and improving engagement.

Jeff Lange
CEO, The Financial Advice Service (TFAS)



Making the complex **simple**

Fully integrated with your current intelliflo office licence as standard, our **integrated portal** can help you:

→ **Securely personalise two-way client engagement**

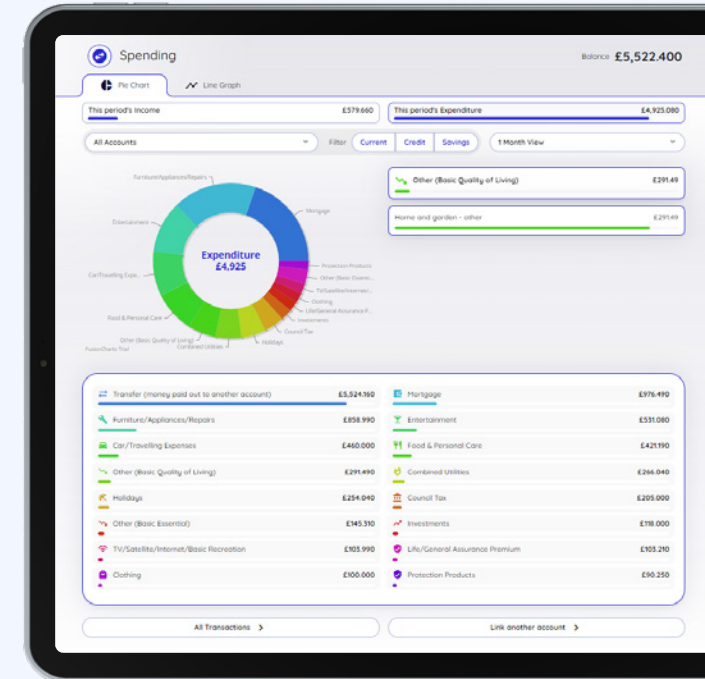
An integrated client portal creates a secure environment for two-way engagement with your entire client base, at any time, on any device. Generate powerful insights tailored for your clients, looking at their finances holistically. Enable your clients to easily access their financial information and demonstrate the value you're adding.

→ **Support all of your compliance and reporting needs**

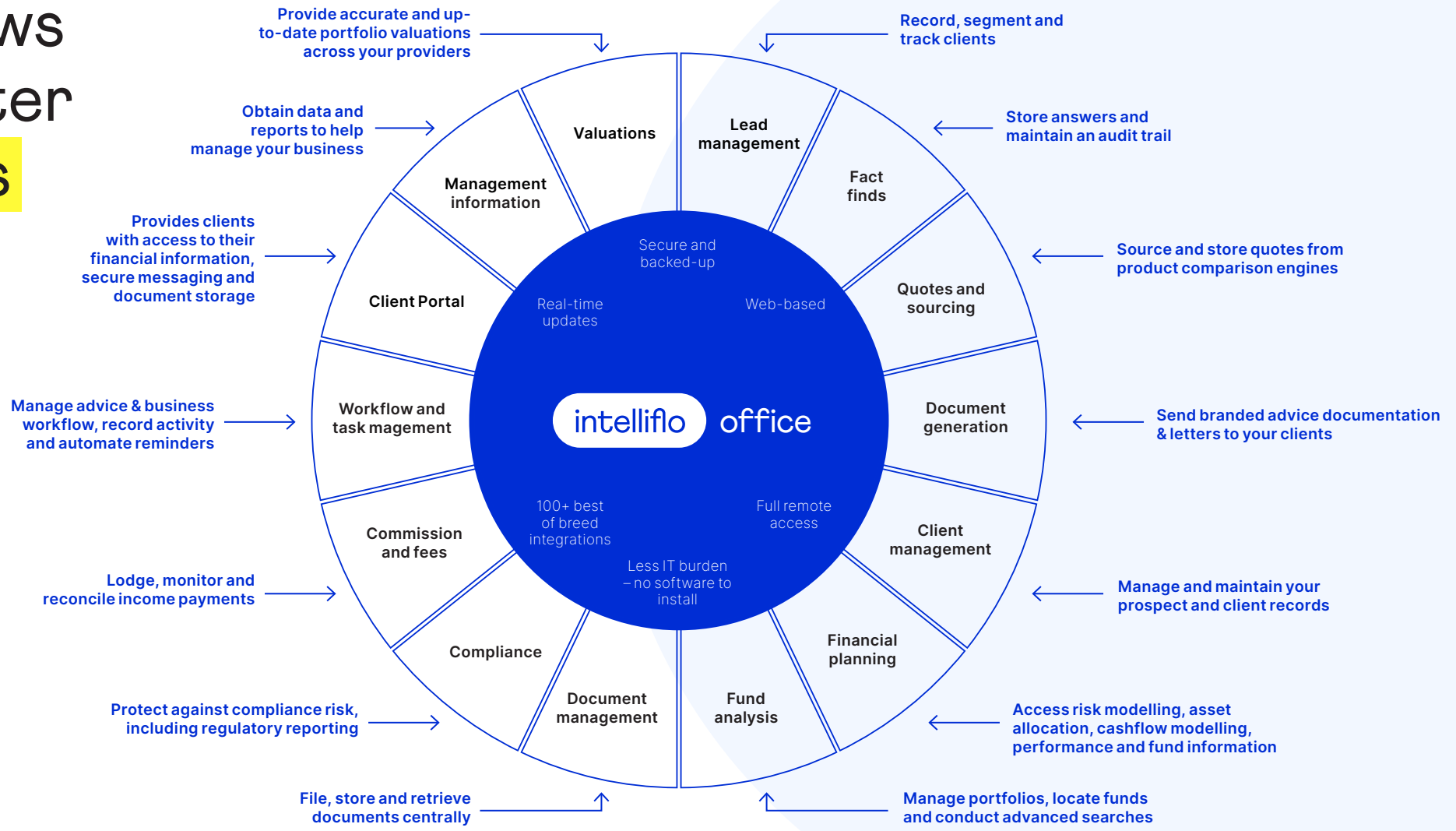
Discuss and share information confidentially with your clients, safe in the knowledge that you're compliant with all laws and regulatory requirements. Share, confirm and submit documents online on the same day, with all documents automatically saved and stored securely.

→ **Drive efficiencies and grow your business**

Minimise processing time and reduce your servicing costs. All while freeing up more time to spend advising clients and growing your business. Create an enriched and personalised client experience, with seamless two-way data integrations from intelliflo office, including digital signatures and video.



Seamless workflows for better business



Enhance your **client experience** through integrations

A whole host of innovative, built-in apps are available to **drive client engagement**, and make your life easier:



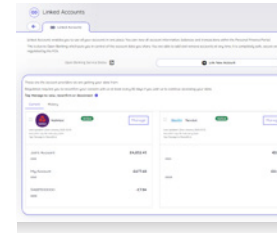
Secure compliant video chat

Glia offers a safe, modern and fully compliant way to meet with clients via video, text chat and audio. It automatically records all conversations and shared files to provide an audit trail.



Fast, compliant, paperless office

No more waiting around to receive, sign and re-send documents. Our DocuSign integration accelerates the execution process with your client, through fully compliant electronic signatures, all backed up in the client record, with a digital audit trail.



Seamlessly connect with banking accounts

Our open banking integration provides a full overview of more of your clients' investments, savings and accounts and enables you to discover any held-away assets more easily. You can start working with accurate figures for the initial fact find, avoiding the pain of going through bank statements.



Financial forecast

Seamlessly integrated into intelliflo office, financial forecast is a visually engaging, client-focused app designed to engage your clients with their life goals, through a simple, yet impactful charts that provide clarity on their long-term financial plans.



About **intelliflo**

intelliflo **widens access to financial advice** through leading technology powering the financial advisory experience.

We use open software architectures combined with unmatched industry experience to simplify a complex digital landscape to help advisers compete and grow.

Our solutions support **over 30,000 financial advisers worldwide**, representing **over three million** end-investors, with **over \$1 trillion** serviced across our platforms.

Here for you

If you'd like to find out how the intelliflo client portal is benefiting other businesses, or if you have any other questions related to, please get in touch.

→ [click intelliflo.com](https://www.intelliflo.com)

