

intelliflo office

→ wealthlink
Key less. Do more.

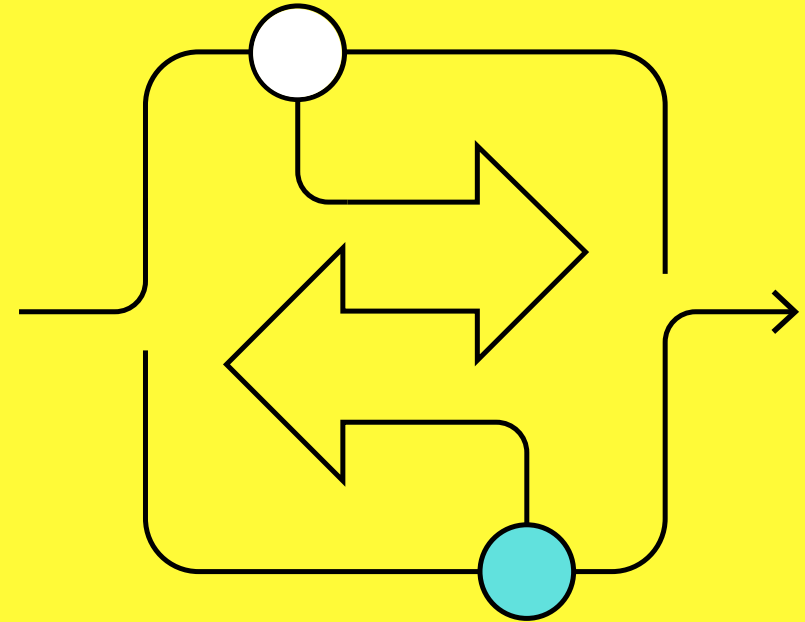
intelliflo.com

SS&C
a wealthlink integration



→ Introducing wealthlink

wealthlink redefines how you put investment plans into action. Remove rekeying, improve outcomes and decimate admin time by investing and managing clients' portfolios, directly from **intelliflo office**.





Break down your barriers to **success**

wealthlink brings a new, intelligent integration between intelliflo office and a modern, paperless open architecture investment platform from SS&C.

Everything you need to set up and maintain your clients' investment plans you can now do from right inside intelliflo office. You won't need to log into the investment platform.

You no longer need to move between systems. Timeouts and keying errors disappear. Client outcomes improve. And everyone has a better day at work.

Key less. Do more.

For many years, fragmentation of technology, rekeying and systems not integrating have been frustrating for adviser firms. Now intelligflo, in partnership with SS&C is set to change all that. For the first time, firms will be able to execute their clients' financial plans on a fully-featured adviser platform, from within their practice management system. intelligflo and SS&C have worked together to create a seamless, integrated way of working which gives firms control and access to SS&C's advanced functionality without ever having to leave intelligflo office.

The benefits of this deep integration called wealthlink, are obvious – less rekeying means fewer errors, less rework and better outcomes as a result. More than that, it supports firms make their team's working days less stressful, help with training and making staff more effective, quicker. It super charges efficiency – especially when used alongside intelligflo's personal finance portal.





intelliflo and SS&C have partnered to provide 0.15% on client portfolios up to £249,999 and reducing above that.

All this for a platform with open architecture, a full range of tax wrappers and advanced reporting, portfolio management and adviser charging capabilities.

These benefits will be available to firms of any size. Firms can simply spend less time implementing plans, and more time reviewing them with clients.

What's in it for you?

An end to rekeying

Intelligent integration means never having to leave intelliflo to put clients' investment plans into action. Our industry-first partnership with SS&C means your team can do everything you need from one familiar place. Data passes between intelliflo and the platform in real-time.

We've worked closely with SS&C to make sure every individual field

matches up, meaning frustrations about one system not speaking to another are a thing of the past.

And it's not just at the outset – maintaining, rebalancing and reporting on investments all happens from intelliflo too. It's just quicker, easier and better this way.

Better outcomes for everyone

The best developments work for everyone, and that's what wealthlink does.

Clients come first – our intelligent integration between intelliflo and SS&C means they benefit from greater accuracy, a more efficient adviser practice and a market leading price.

Your business benefits too. Intelligent integration means reporting and maintaining financial plans is easier and quicker than ever. Rework is removed. Errors are ejected. And everyone gets that little bit more efficient. You have an easier time and the working day is just...better.

Suitability first

Intelligent integration is great, but the building blocks have to be suitable for your target client segments.

The SS&C platform you execute plans on from inside intelliflo office is everything you could want from a modern platform. It's paperless, wet-signatureless and open architecture, including access to external DFMs, a wide range of ETFs and other securities. It has a full range of tax wrappers and advanced features like fractional trading of ETFs and sophisticated rebalancing.

Suitability isn't the same as price, but it helps:

- **0.15% up to £249,999, drops to**
- **0.125% from £249,999 to £499,999**
- **0.10% from £499,999 to £999,999**
- **and is just 0.05% over £1m.**

Perhaps best of all – these terms aren't dependent on the size of your firm or any commitment to place a certain level of asset. Every intelliflo customer qualifies. Isn't that just...better?



Industry voice

“

We've been writing for some years that eventually someone would just get on with it and create a completely seamless integration between practice management systems and platforms.

intelliflo and SS&C have done just that, and it throws the gauntlet down to the rest of the industry to think about how it can genuinely work to provide firms with transformational efficiency gains. We'll be fascinated to see what firms make of it and the undoubted impact wealthlink will have on the sector.

Mark Polson, Principal, the lang cat

Making the complex **simple**

wealthlink has been carefully designed to simplify the way you work across your practice management system and your investment platform. Our intelligent integration ensures all the data necessary is captured in intelliflo so you can set up, manage and maintain plans without needing to move between systems.

→ **Stay in a place you know**

We've worked with SS&C to ensure our screens capture all the data necessary, so you never have to leave the familiar intelliflo environment.

→ **Full service**

You're not on your own – teams from intelliflo and SS&C are ready to help when required. We'll help you understand who to call when.

→ **Robust and tested**

We know you and your clients depend on things working smoothly. Both intelliflo and SS&C are fully committed to providing a great experience now and in future.

→ **A better day in (the) office**

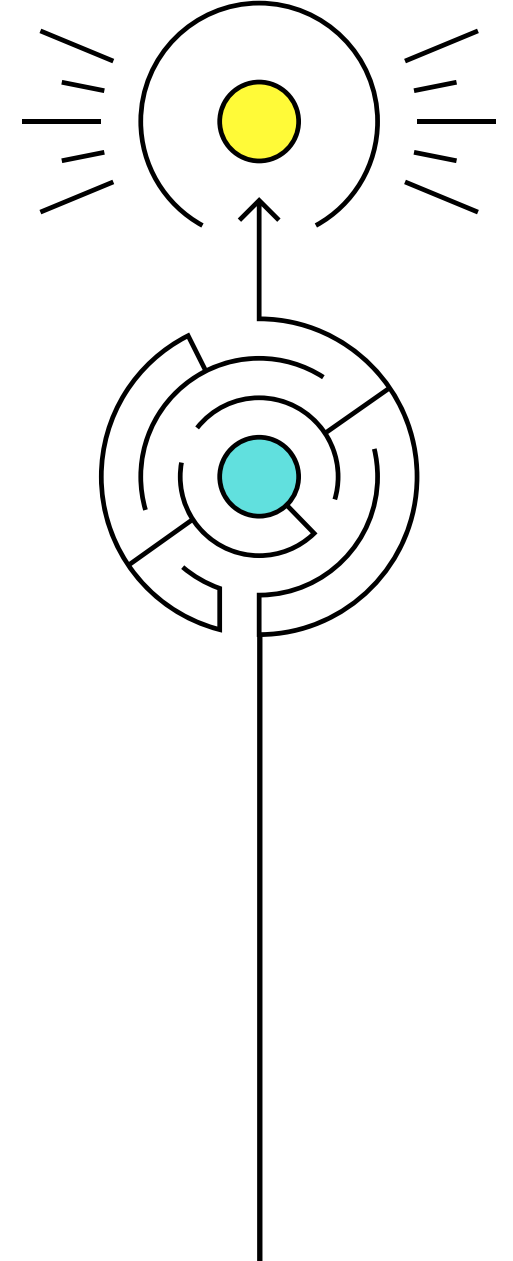
You no longer need to move between disparate systems. Timeouts and errors disappear. Training time is reduced. And everyone has a better day at work.

→ **Part of the process**

intelliflo's intelligent integration extends to our client portal and our cashflow modelling capability. Used together with wealthlink, it's a powerful suite to power your practice.

→ **Exclusively for everyone**

All intelliflo customers and clients can benefit. wealthlink has been designed to deliver better outcomes for everyone.



Countdown to success

Put intelligent integration to work in your business

- 1. Take the first step.** Anyone can [register their interest](#) in joining our wealthlink journey today.
- 2. Place your first case.** We'll work with you to make sure things go smoothly. It's a good idea to make your first case a relatively straightforward one, just while you get used to wealthlink.
- 3. Share your experience.** This is new, and your colleagues will value your learning. The wider intelliflo community will too; sharing is good.
- 4. Exclusively for you, and everyone.** wealthlink has been designed to deliver better outcomes for firms of any size. Better for clients, better for you.





Intelligent integration works for everyone

Whether or not your firm sees itself as part of the solution for the advice gap, we know from recent research that for every client who currently experiences the benefit of advice, there's another who can't access it.

To put it another way, the whole advice market is only half as big as it should be.

That's been the way for many years, but we haven't collectively found a way to unlock the potential and close that gap. Yet. Whatever the solution is, we know at intelliflo that efficiency and using the unbelievable power of technology is fundamental.

If part of the answer is ensuring that data only ever needs entered once and administration is ruthlessly minimised, then we think we might be onto something with wealthlink.

We'll keep working and innovating – to give you the tools you need to take your business as far as you want to take it and to give the maximum number of clients the potential to experience the transformational benefits of advice.

intelliflo office

Here for you

Matching your pace with the continuous evolution of intelliflo office ensures you stay one step ahead of your competition.

Register your interest today

intelliflo.com/our-solutions/intelliflo-office/wealthlink/

