

intelliflo office

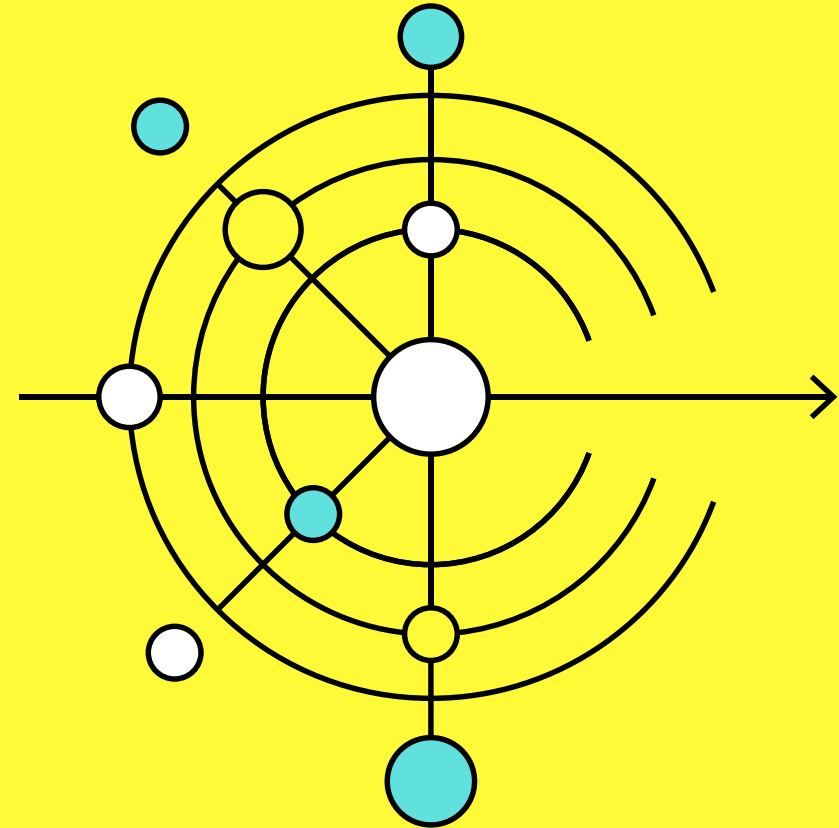
→ One powerful
system to drive your
business forward

intelliflo.com



→ Introducing intelliflo office

Designed for financial advisors, **intelliflo office** is a comprehensive and flexible business management solution that simplifies your business, improves efficiency, and saves you time to focus on what matters, your clients.





Break down your barriers to **success**

Servicing existing clients and prospecting for new ones both take serious planning, thought and time.

While putting the interests of clients first is undoubtedly what makes a successful advisor, making a financial advisory business a success is not quite as straightforward.

Whether you want to generate efficiencies, achieve growth plans, evolve for the future, give clients a more consistent and engaging experience, or have more confidence in your data – **you're going to need the right technology to support you.**

intelliflo office is an award-winning solution that can do just that.

What's in it for you?

Generate efficiencies and save time

View accurate Assets Under Management (AUM), without having to contact custodians. Easily reconcile fees, check on valuations, policies, and client plans.

One-stop data source used for a variety of purposes. Eliminate 'swivel chair' with consolidated views. View a client's history, with information categorized and sub categorized – and all at the click of a button.

Grow and evolve for the future

As your business grows, you can select and seamlessly incorporate any of the best of breed integrations, as and when your business needs them.

Scale the technical backbone of your business at a pace that is right for you. Initially you may want to just automate client data feeds.

Give advisors and clients a more consistent and engaging experience

Securely view, discuss, and share financial information with clients. Provide clients with up-to-date portfolio valuations, and clear visibility of their net worth. Advisors and clients are one team.

An automatic audit trail provides peace of mind, and the white-label function means all your clients see is your own brand.

The proof is in the **people**. Hear from some of our long-standing customers.

“

Before we moved to **intelliflo office**, our business had four support staff to every financial advisor. 18 months later that number was one to one. Additionally, the capacity of the financial planners has increased – they can now deal with more clients than they could before.

Ian Plumpton
Chief Operating Officer
Attivo Financial Planners

“

intelliflo office enables me to reconcile fees, check on valuations, policies and plans and to communicate directly with my clients through the client portal – all in one place. It's basically pulled the whole advice process together and has really introduced some excellent efficiencies within my business.

Geoff Matthews
Owner, Director and Financial Advisor
Cansquared

“

Some of our clients have been with us for 20 years, and before we had **intelliflo office** we had to look through 20 years of documentation. Documents are now attached to client records and are right there, which has massively reduced time, effort, and of course frustration!

Chirine Harb
Head of Operations
Capital Asset Management

Making the complex simple

intelliflo office was designed for and will continue to future-proof the industry with our customers and their clients at the forefront of our innovation. **intelliflo office** can enable you to...

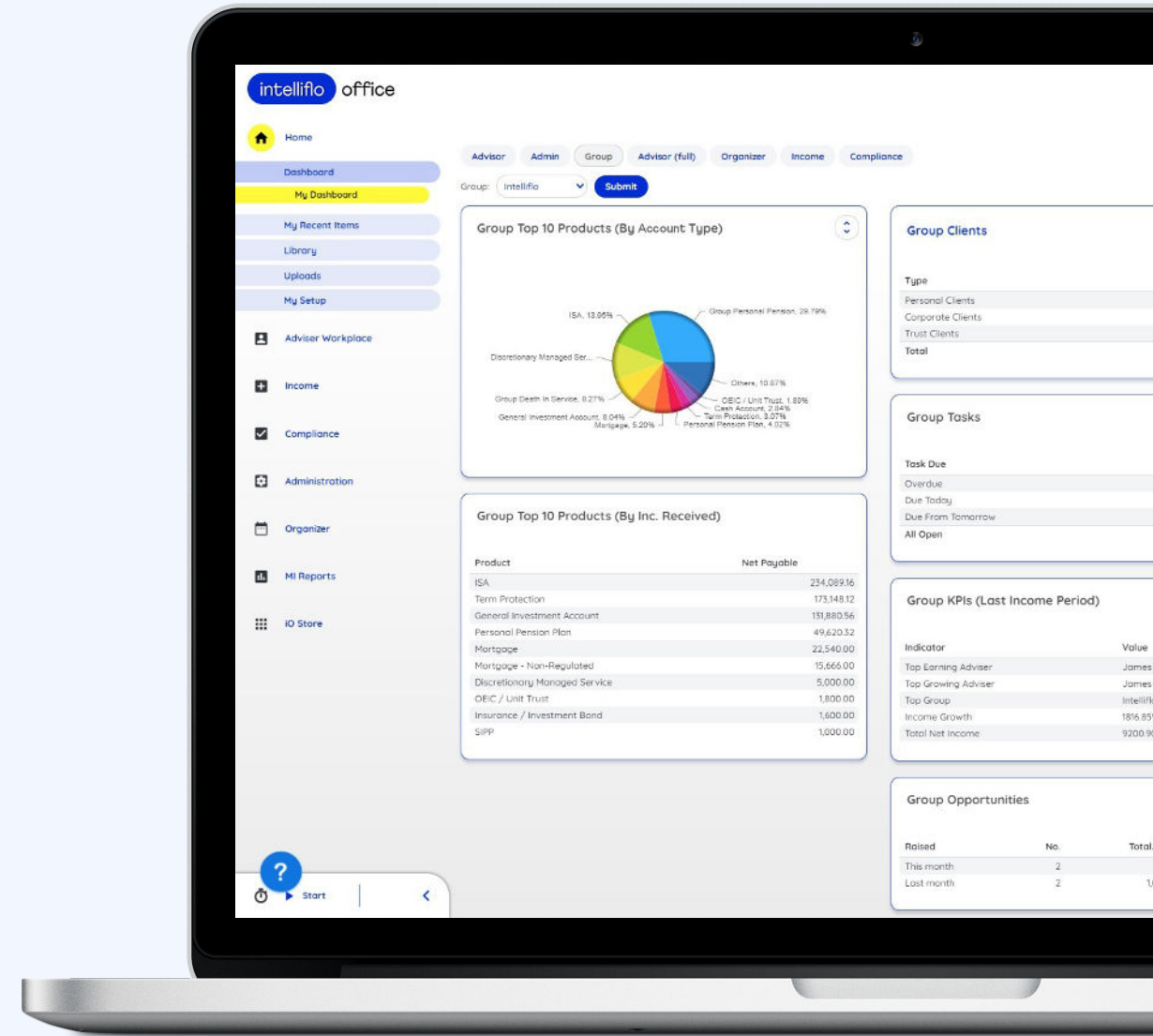
→ **Share, confirm and submit documents** making it simple to minimize processing time and reduce servicing costs

→ **Access real-time valuations** making it simple to value your clients' holdings with automated portfolio population

→ **Collect data from multiple areas** making it simple to enable accurate and cross-referenced reporting

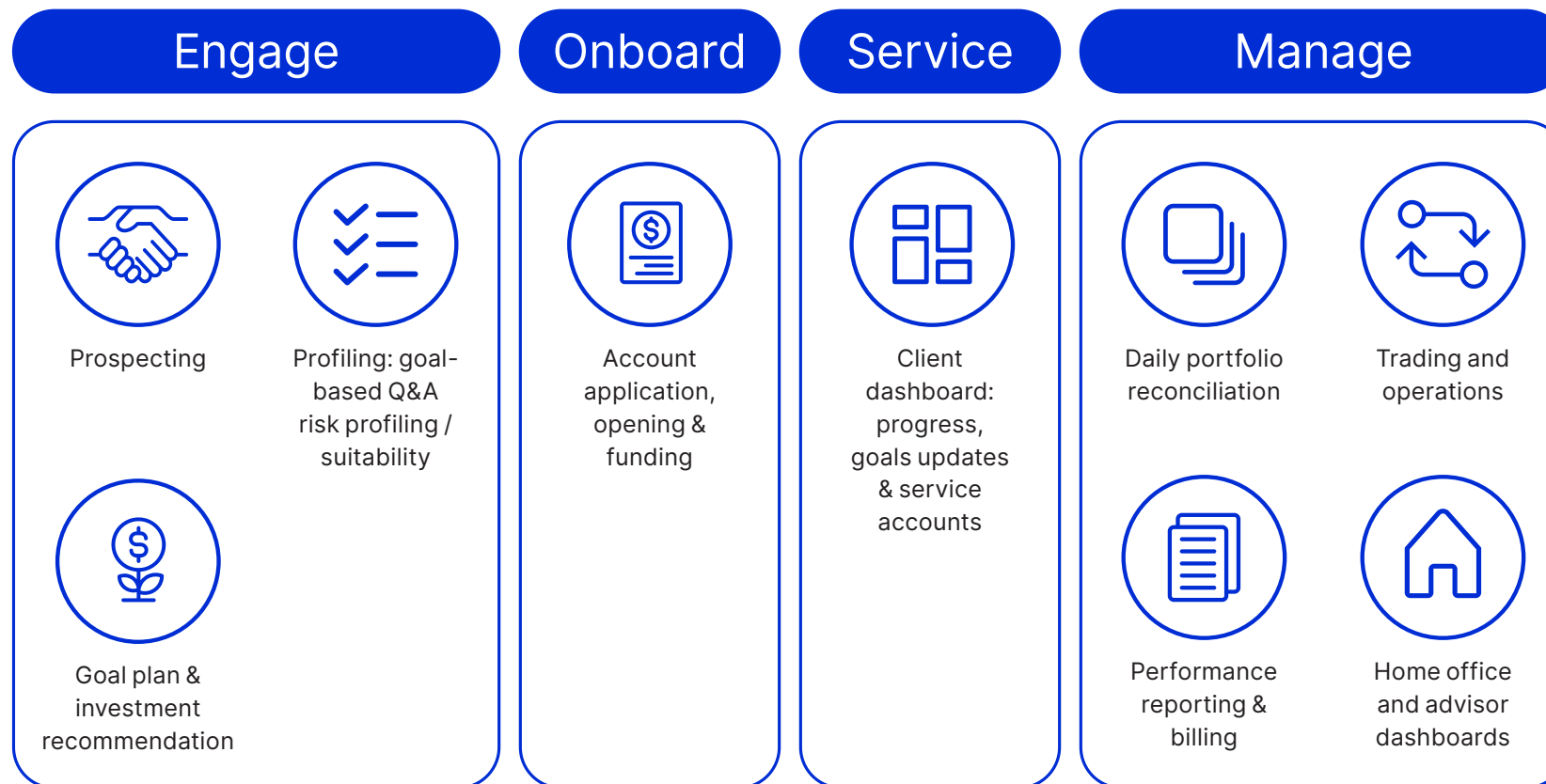
→ **Improve the quality of your business intelligence** making it simple to have more confidence in your data to drive decision making

→ **Streamline your data entry** making it simple to increase the rate of accuracy and reduce data entry errors



Seamless workflows for better business

intelliflo office offers end-to-end business support from client engagement to management. By providing all of these capabilities, you can spend more time on what really matters, your clients.



Countdown to success

Drive your business forward with intelliflo:

1.

Get started quickly. With no software to install, all you need to do is [connect with our team](#). They'll support you with demos, data migration, onboarding and training.

2.

Security built in. Protecting your clients' data is as important to us as it is to you. **intelliflo office** is protected and secure.

3.

Perfect for any size business. The backbone of advisory businesses. Affordable and effective for smaller firms, but powerful enough to support large customers. Whatever size of your business, join intelliflo and grow with us.



intelliflo office

Here for you

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

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

Book a demo today

visit [intelliflo.com/us/get-in-touch/book-a-demo](https://www.intelliflo.com/us/get-in-touch/book-a-demo)

