10 reasons to use Intelligent Office

Intelligent Office (iO) is the most comprehensive end to end web-based business management system in the UK financial services market. This 'one-stop shop' lets you manage all your client and provider data within a single technology eco-system and align it to your service proposition enabling you to:

- Become a lean and efficient organisation
- Manage the risks
- Build a better business

Huge time and cost savings
iO streamlines all administration processes from the initial fact find to new business submissions, from obtaining quotes to matching income and fees and from obtaining valuations to producing MI and RMAR reports. Taking care of all these processes means that you can concentrate on growing your business.

Built in flexibility to use the tools you want
Through over 450+ 'best of breed' integrations with popular quote portals, wealth management tools, fund and product providers. This list is growing as we continually add integrations based on adviser requests.

A single integrated 'eco-system'
iO is your front, middle and back office system rolled into one – one place where you can seamlessly and efficiently manage the entire advice process.

Market leading income reconcilliation
iO has the most powerful income and fee matching reconciliation functionality in the market place and in 2016 processed £812 million of income and fees, which equates to 65% of the industry's electronic statements.

System that grows with you
iO is a scalable technology which works for any size of business or distribution model, whether that be independent, tied or mortgage adviser, network or national and product or fund provider.

Protection for your business
Standardise and automate your compliance to ensure you meet all regulatory reporting requirements, such as RMAR, at the touch of a button.

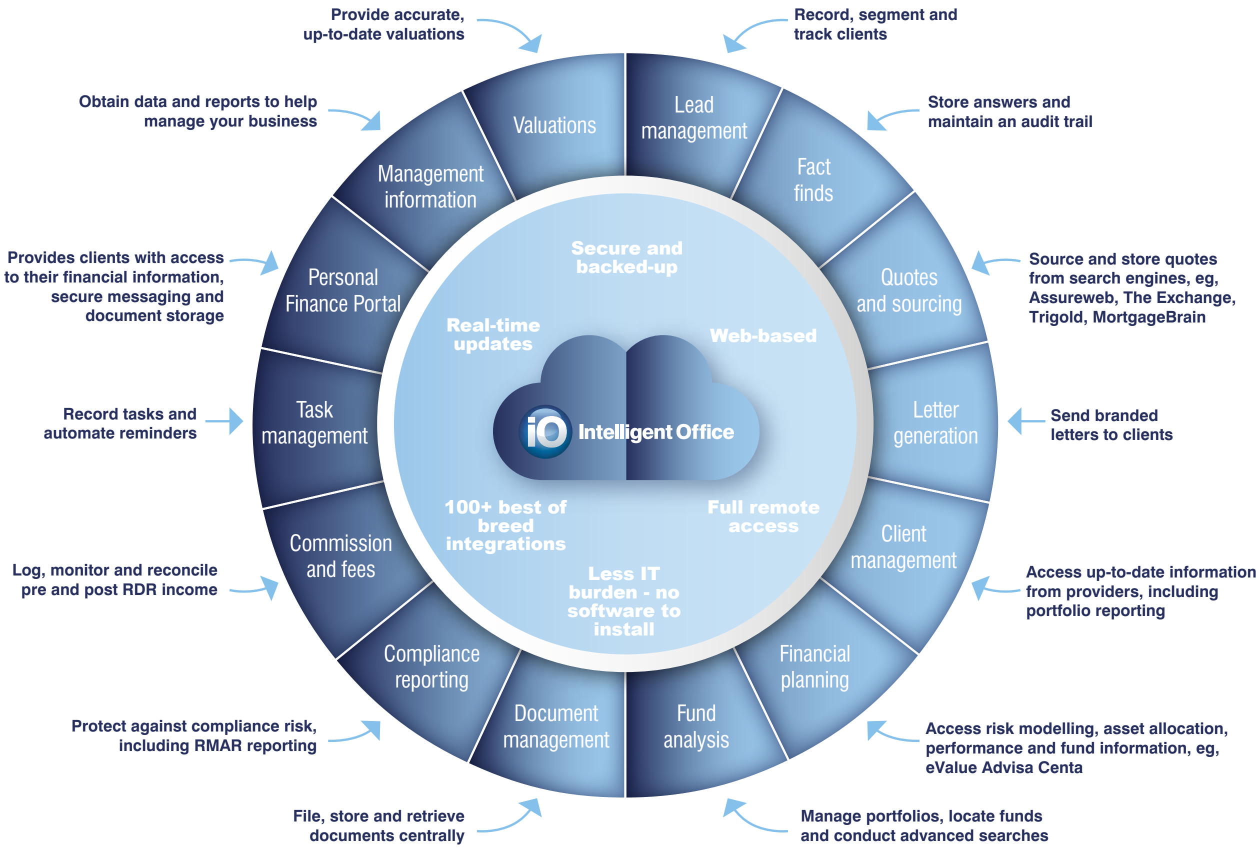
UK centric with continual updates
Future-proof your business with a system that was built for the UK advice market and continues to upgrade, improve and adapt to match its constantly changing needs.

Streamlined valuations
In 2016, iO fulfilled more than 65 million valuation requests through its integrations with over 85+ product and fund providers.

Secure access wherever you are
iO is a web-based system, which means that all you need is a web browser and an internet connection to access your data on any device, at any time, anywhere. It's backed up constantly with the highest quality data security systems.

Enhance your client proposition
Working hand-in-hand with iO, the new, improved Personal Finance Portal (PFP) gives you and your clients an invaluable tool on which to view financial information and interact via a secure, online 'hub' anywhere and on any device.

Intelligent Office – at a glance



FAQs

Are you paying extra to use an income and fee reconciliation module? With Intelligent 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 Intelligent Office (iO), after all this should form the basis of your back office proposition.

How do you gather information for your Gabriel returns? With iO the process is seamless.
Due to the integrated nature of iO, 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 iO. 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 iO is as easy as abc.
If you still value policies on a case by case basis and over the phone, iO can transform your business - saving you time and money. iO 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 iO, the, improved Personal Finance Portal (PFP) makes servicing your clients cheaper by saving processing time, postage and printing costs. This invaluable tool offers you and your clients the ability to securely view and share financial information online, provide up-to-date 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 on desktop, laptop, tablet and mobile phone so you and your clients can have information at your fingertips any time, anywhere.

For more information call us on **0845 230 3800** or email us on **info@intelliflo.com**