

Personal Finance Portal



Intelliflo's Personal Finance Portal (PFP) is a powerful and secure, online communication system which can help you segment your client service proposition, improve client satisfaction and save you money.

Benefits for your clients

Two way secure messaging

Posting or emailing financial information can be costly and insecure. PFP offers you and your clients a modern, online, password protected and encrypted messaging system so you react quickly to their changing requirements or alert them to market movements.

Secure document storage vault

All of your client's documents, from the initial fact find, through to their policy documents and supporting material can be stored securely on the PFP. All stored documents can be accessed by you or your clients 24/7 and benefit from being constantly backed up and instantly retrievable.

Figures from CIFAS – the UK's Fraud Prevention Agency – tell us that address fraud and account takeover fraud is an ongoing problem. This happens because the fraudster has access to, or can intercept, the victim's post. They also report that personal papers are frequently targeted in burglaries and that fraudsters are paying per document to find personal details in people's dustbins. Therefore it is vital that firms take appropriate steps to ensure that their consumers are not exposed to any unnecessary risk.

Source FCA Website

Client access to their financial information

PFP allows you to give your clients access to their own individual online dashboard, allowing them to view their investments, up-to-date valuations and fund factsheets in detail across a range of devices including mobiles and tablets. For example, this means clients can view their financial position in between portfolio review dates or print off information for tax returns.

The Internet has changed the way people go about their daily lives and internet use has doubled since 2006. Almost three quarters of adults in Great Britain used the Internet everyday (73%) in 2013, with 6 out of every 10 adults (61%) using a mobile phone or portable computer to access the Internet 'on the go'.

Source National Office of Statistics

Client access to buy protection cover

Clients who want to self-serve their protection requirements can get quotes from 10 of the leading protection companies and buy cover online if they need to.

Benefits for you

Segmenting your client service proposition

Ongoing client service has to be delivered in a way that secures profit for you whilst ensuring your clients' continued satisfaction. Increased time pressure means that the more information you can put at your clients' fingertips, the more time you can free up to spend running your business and prospecting for new clients. The PFP allows you to be cost-efficient by automating aspects of your service delivery and decreasing the amount of time you need to spend 'face to face' with certain segments of your client base. All this whilst giving clients timely access to the kind of information they expect.

Giving clients a great experience

As consumers, most of us are used to being able to access our information wherever and whenever we want to, whether it's our online bank account, comparison tables, or researching the most up to date offers and deals. We may want to transact on our way to the airport, on a train, or just surf the web in our lounge with our feet up. The PFP allows you to give your clients access to their financial information wherever and whenever they want to see it, on their preferred device. They will appreciate the transparency of the information and view it as part of a great customer experience, delivered by you.



“

The relationship with our customers is fundamental to our business. The Personal Finance Portal allows us to free up our time for giving advice whilst allowing customers to access their records if they just need valuation information.

John Pemberton

Jones Sheridan Financial Consulting Limited

Supporting your brand values

The PFP can be customised with your brand and corporate livery. This reinforces your brand and enables you to present the technology as proprietary. Through providing white-labelled, consolidated valuations and portfolio information, the PFP can help you build closer relationships with your clients whilst keeping your costs down.

Gaining competitive advantage

Differentiating service can be a big challenge, especially for small businesses. Branding the PFP for your clients allows you to differentiate your proposition in a way that will be beyond the reach of many businesses and present your proposition in a way that rivals the biggest financial organisations in the UK. It can be used as a 'premium service' for high value clients and priced into your offering as an additional, paid for, service.

“

The customer relationship needs to be with our brand – this is vital to us. Intelligent Office and the Personal Finance Portal can be fully branded, helping us to achieve this.

Jane Hodges

Chief Operating Officer, Alexander House Financial Services