



Intelligent Office

Powered by Intelliflo. Driven by you.



**Transform your
business with
Intelligent Office**

Intelligent Technology for Financial Services



Top of the range

Intelligent Office (iO) is the most comprehensive and flexible web-based business management system in the UK financial services market.

It offers you an extraordinary range of functions to help transform your business, including market-leading income and fee matching reconciliation.

This web-based 'one-stop shop' lets you manage all your client and provider data within a single system and align it to your service proposition. It sits at the heart of your business and powers it from A to Z, creating a remarkable set of benefits:

- 1 Business efficiencies** that will transform your bottom line
- 2 Streamlined administration processes** giving you more time to spend servicing your clients or prospecting for new ones
- 3 Increased profitability** thanks to improved operational efficiency, time savings and reduced staff costs
- 4 Protection for your business** mitigating risk and avoiding compliance fines, by creating clear regulatory reports and audit trails
- 5 Access wherever you are** so you can access your data remotely at any time that suits you
- 6 Tailored support** you can create tailored systems and dashboards in your own brand colours to suit your business's unique way of working

iO also provides vital IT support for business growth, customer services and business management. It is suitable for all kinds of companies and organisations, including sole-trader advisers, network providers, service providers and large enterprises such as banks and life assurance companies.

“ This will save us £70,000 a year in direct employment costs through auto-matching commissions. I believe we will save around £120,000 across the business by implementing the automated valuation system. ”

Neil Messenger
National Head of Financial Planning, Grant Thornton Financial Planning

Improving your business's efficiency and profit

Helping our clients improve their profitability is vital to our own success. This has driven the growth of our business, which in turn enables us to keep investing in our award-winning software so that it provides even more benefits for our clients.

The way iO enhances your efficiency and profit will depend on the size of your business:

- In a small business, you can increase revenue because you will have more free time to attract new clients and generate extra income streams
- Medium-sized firms could slash costs by moving away from traditional office-based staff and focusing on working remotely
- Larger businesses will save money by cutting staff and other fixed costs through, for example, centralising commission reconciliation and service execution



This brochure summarises iO's key benefits. If you want to know more about individual features or services, please call us on **0845 230 3700** or visit **www.intelliflo.com**



Integrating with major providers

iO speeds up the process of communicating with product providers and fund managers, saving you time and trouble – and reducing the risk of errors. You get instant access to up-to-date accurate information, drawn from over 40 product and fund providers and market-leading quote systems.

When it comes to valuations and income reconciliations, iO's functionality has transformed the UK market. Intelliflo currently fulfils more valuations than any other platform (over two million in 2012) and auto-matched more than seven million commission and advice charge items during the first six months of 2013.

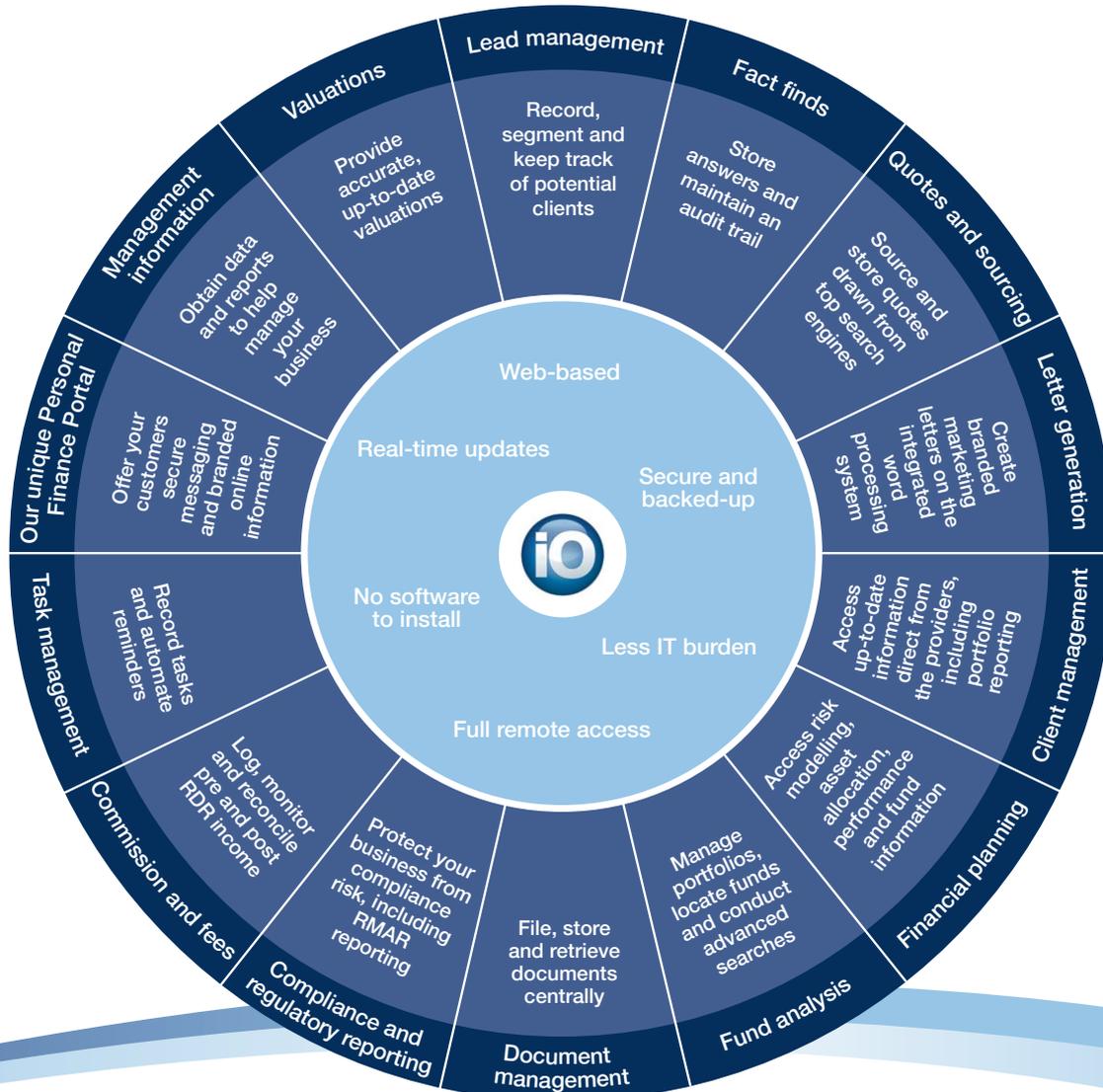
“ Having a system like Intelligent Office, with all the information on it, including funds under management and policies, is going to make it much easier to put a value on our business – and make it more attractive for anyone wanting to buy it. ”

Andrew Oliver
Andrew Oliver & Co



This is all you need

Through its state-of-the-art web-based system and vast functionality, iO can help with every aspect of your business.



“ Suddenly you can start concentrating on building your business rather than all the nonsense you were dealing with previously.

If you're considering using Intelligent Office I can only say you should do it. It has worked for us. It has worked for every other firm I have spoken to and I have absolutely no doubt it will work for you. ”

Chris Hirsch
Managing Partner, Holland Hahn & Wills

Welcome to the cloud

The advantages of web or 'cloud-based' over desktop-based technology include lower costs, reduced maintenance and access to real-time updates. There's no software to install or update, as the system is updated centrally by Intelliflo – and there's no hardware to maintain either.

You will also enjoy improved security thanks to our centralised back-up and disaster recovery.

And, of course, you can access the system remotely 24/7 and the information will be completely up-to-date.

Combining simplicity with sophistication

Because iO includes so many functions within a single configurable platform, it can simplify many of your office administration processes, saving you time and money.

Instead of having to maintain, service and upgrade multiple systems, you can leave it all to iO – where everything you need is contained within a single package.



Tailored to your business needs with superb support

You can tailor iO's dashboard to suit your business and to different staff – for example, to match an adviser's individual way of working or for a paraplanner's specific needs. Our menu of features and processes can be highly personalised to your business and branded with your logo and colour scheme.

iO is easy to set up and our expert, friendly consultants are always here to help. You can call on their specialised technical knowledge and collective expertise, drawn from an extensive financial services background, whenever you need them.

They can work with you to create a tailored system, designed to create real business efficiencies and cost savings, and based on the functionality and processes that your business needs.

With our expert help, you simply:



Once you've tailored everything to suit your organisation, our team will work with you through every stage of the process, to ensure the switch to iO goes as quickly and easily as possible.

Once iO is up and running, you'll find it intuitive and easy to use. However, if you need support at any time, just call our UK helpline. Our Support Analysts will view your system remotely and help you as quickly and efficiently as possible.

“ What I've loved about implementing the system is that the project team is set up and I then get regular project reports telling me how things are going – and the Account Manager assigned to us has been amazing. ”

Jane Hodges
Chief Operating Officer, Alexander House Financial Services

Helping your organisation to grow

Whatever size your business, iO can help it prosper.

The greater your profits, the more potential you have for growth. However, as your business grows, you need to capture scale economies to make sure the growth in costs doesn't exceed the increase in revenue.

iO supports growth by increasing your capacity and helping you to scale operations efficiently. If you are trying to enhance the value of your business with a view to selling it, automating your systems with iO will help leverage the capital value.



Keeping your business safe

iO helps to mitigate the risks to your business in various ways.

Firstly, it supports data protection requirements by controlling access to data and MI.

It uses a high-security data centre with advanced disaster recovery and back-up arrangements, far exceeding the capabilities of most advice businesses. The secure messaging facility available in the Personal Finance Portal also provides valuable risk management benefits.

Making compliance easier

iO can simplify the day-to-day running of your business by 'hard coding' your advice process. It gives you a high level of control and helps you to provide the transparent, recorded processes that the regulator requires, by making it easier for you to show that your services and advice have been delivered consistently and compliantly. It reduces the likelihood of compliance breaches, by:

Matching the functionality to your business to identify and prevent 'weak spots'

Increasing control over record-keeping

Standardising and automating processes to ensure everyone is using the same system and meeting the same standards

Providing a clear, easy-access audit trail

Facilitating compliance reporting requirements

“ More and more of our work is done by email. We were concerned about security because people use smart phones and they don't have the same security as computers. We've been using secure messaging for a couple of months now and we like it very much. It works. It's nice and straightforward. Clients like it, and they like the fact that they can store some of their own information in the system. ”

Christopher Hirsch
Senior Partner, Holland Hahn & Wills LLP

Enhancing your client service proposition with the Personal Finance Portal

Through the Personal Finance Portal, you can offer your clients access to their own individual online dashboard, allowing them to view their investments and up-to-date valuations in detail as well as print off information for tax returns. Clients can store their documents securely in the document vault and communicate with you online using secure messaging.

Putting this information at your clients' fingertips frees up your time to spend on running your business and prospecting for new clients.

Supporting your brand values

Your iO dashboard can be customised with your brand and corporate livery. This reinforces your brand within your business but also enables you to present the technology as proprietary.

Through white-labelled, consolidated valuations and other communications, iO helps you to build closer relationships with your clients.

Keeping track of fees and income

iO has the most powerful income and fee matching reconciliation functionality in the marketplace today, enabling you to log, monitor and reconcile fees, retainers and commissions automatically.

On a monthly basis the system processes over £30 million of income – this is more than 70% of the industry's electronic statements (EDI).



“ 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 Office, Alexander House Financial Services



“ Without the valuation service and Personal Finance Portal in Intelligent Office, we simply couldn't deliver an ongoing review service for the price the customers want. ”

Jane Hodges
Chief Operating Office, Alexander House Financial Services

If you'd like to know more

If you have any questions about Intelligent Office, please get in touch.

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