

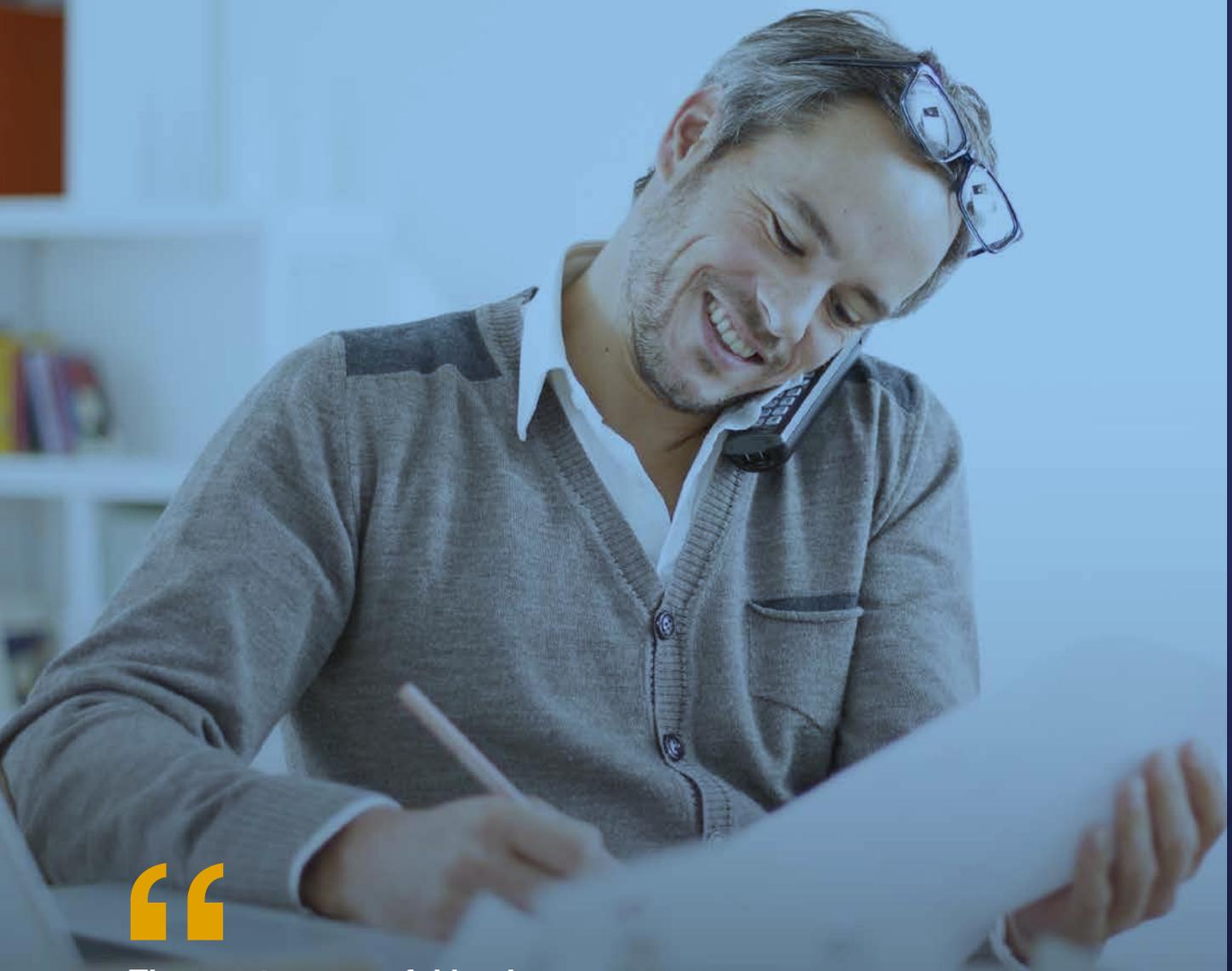
Welcome to

Intelliflo



0330 102 8402

info@intelliflo.com | intelliflo.com



The most successful businesses are the ones that evolve. That is one of the main reasons why we picked Intelliflo to partner with.

Alex Simpson,
Managing director, Harding Financial

About Intelliflo

At Intelliflo, we believe that our customers in the financial services sector deserve software that helps them be lean and efficient, manage the risks and build a better business.

We help the financial services community thrive in an ever-changing market by making their operations more professional and profitable. We do this through continually developing our best-in-class, web-based business management system to help our customers compete and win.

Users of our Intelligent Office software benefit from our open architecture approach, so that they can build the system that they need, not just use the system that they are given.

Our IT expertise, coupled with years of experience of the UK financial services sector, ensures that Intelligent Office offers an unparalleled degree of specialism for our customers.

Our philosophy

Ever since our inception in 2004 we have been built on the independent foundation of open architecture.

This means that our software is fully open and fully configurable so that our customers can build the business management software that they need, not just work with the software that they are given.

No two financial advice businesses operate in the same way, so why should they have to work with the same software and the same set of tools? Our Intelligent Office system uses Open API infrastructure to enable third parties to build functionality into it, meaning that we integrate with an unparalleled number of partners and providers.

This means that Intelligent Office is suitable for firms of all shapes and sizes and the industry agrees - as of the start of 2019 Intelligent Office is used by over a third of the UK financial advice market. Open architecture remains the core philosophy at Intelliflo.



**Using Intelligent Office
has brought us into the
21st century and has
opened our eyes to new
opportunities and new
ways of carrying out and
improving our business.**

Abbie Buss,
*Operations manager,
Grosvenor Wealth Management*



0330 102 8402

info@intelliflo.com | intelliflo.com

Our technology

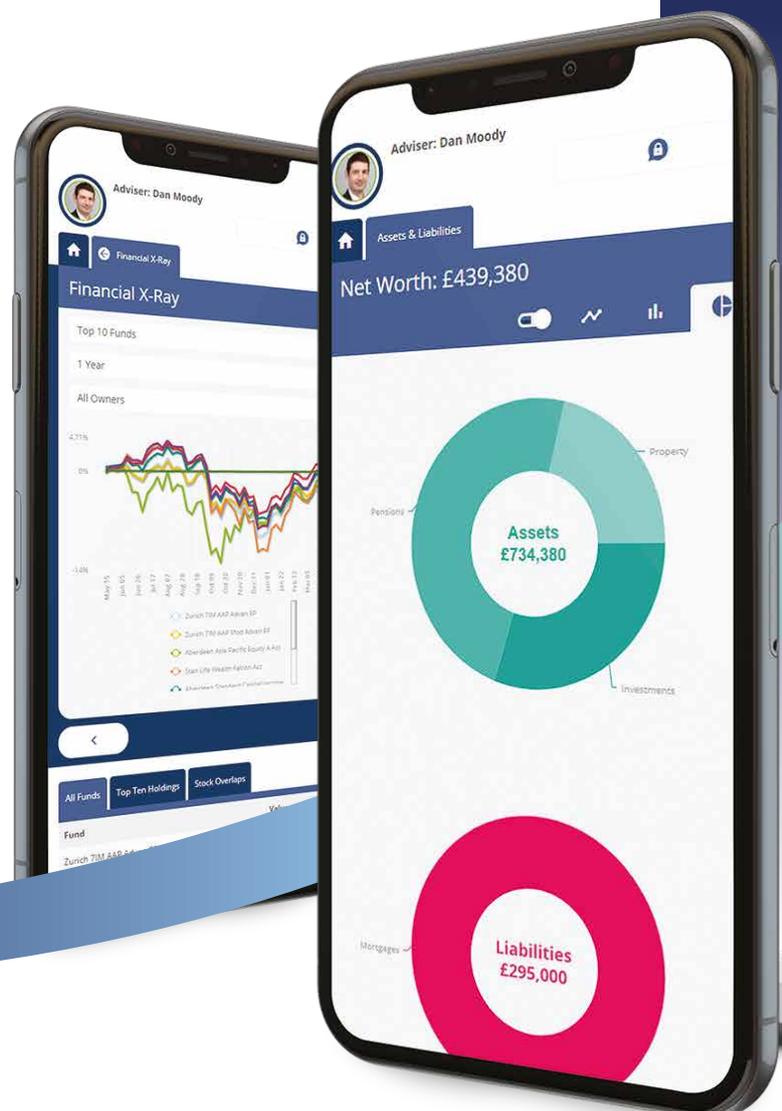
Intelligent Office is a fully configurable and fully online solution. This means that it can be accessed anywhere at anytime, bringing flexibility to any financial advice company.

It also means that any software updates are undertaken in the background and away from core business hours. All work is backed up in the cloud and benefits from Amazon S3 security arrangements to give Intelligent Office users peace of mind when it comes to security.

We also have extensions to the core Intelligent Office offering in the form of the Personal Finance Portal (PFP) and the iO Store™.

PFP is an online client portal that our users can make available to their clients for secure messaging and 24/7 financial portfolio information.

Through the iO Store™ you can install and share apps to customise and enhance your Intelligent Office experience and extend its capabilities.



“

The key is the security of the technology and to fit with my business model. I need technology that will be tailored for me, low cost but very dependable.

Neil Messenger,
National head of financial planning, Grant Thornton

Intelligent Office

Advisor: Workplace | Help & Training | Logged in as: Ebor12074

Client Search []

Advisor | Action Support | Group

My Recent Clients

- David Connor
- Paul Thompson
- The Hunter
- Skinner
- Tanner

My Received Fees and Income

Period: **END November 2019** | Update

| Income Type | Current Period | Previous Period |
|-----------------------|------------------|------------------|
| Initial Commission | 1,388.12 | 2,400.24 |
| Renewal Commission | 0.00 | 0.00 |
| Fund Based Commission | 0.00 | 0.00 |
| Reverse Commission | 0.00 | 0.00 |
| Adjustments | 0.00 | 0.00 |
| Initial Fee | 4,580.00 | 11,181.00 |
| Ongoing Fee | 3,892.85 | 47,168.78 |
| Ad-hoc Fee | 0.00 | 0.00 |
| Referrals | 0.00 | 0.00 |
| Total | 11,961.01 | 60,749.02 |

My Client's Plans

- Mortgages: 4.42%
- Investments: 22.14%
- Private: 6.90%
- Private: 62.27%

My Opportunities - Top 10

| Client | Opportunity | Target Closed Date | Income Value |
|------------------|------------------------|--------------------|--------------|
| Paul Thompson | Existing client review | 25/11/2019 | 1,234.00 |
| Paul Thomas | Mortgage | 26/11/2019 | 495.00 |
| Thomas Anderson | Existing client review | 28/11/2019 | 800.00 |
| Alex Wright | Existing client review | 30/11/2019 | 1,100.00 |
| Sophie Gregory | Mortgage | 30/11/2019 | 495.00 |
| Philip Robertson | Mortgage | 17/12/2019 | 495.00 |
| Samantha Brewer | Existing client review | 18/12/2019 | 1,186.00 |
| Tanya Jones | Existing client review | 22/12/2019 | 0.00 |
| Thomas Anderson | Existing client review | 24/12/2019 | 1,500.00 |
| Jessica Lovett | Existing client review | 26/12/2019 | 500.00 |

My Tasks for Today - Top 10

- Paul Thompson - Existing Client review
- Paul Thompson - New Business Processors
- Paul Thompson - Select advice route
- Paul Thompson - Existing Client review
- Paul Thompson - New Business Processors

My Open Service Cases - Top 10

| Client | Date | Status |
|-----------------|----------|---------------------------|
| Thomas Anderson | 17/09/19 | 4 Recommendation |
| Henry Skelton | 17/09/19 | 3 Research |
| Alex Wright | 18/09/19 | 3 Research |
| Deborah Dubois | 18/09/19 | 1 Select advice process |
| Jessica Lovett | 20/09/19 | 4 Recommendation |
| Sophie Gregory | 10/10/19 | 5 Presentation |
| Markus Cooke | 11/11/19 | 2b Existing Client review |
| Paul Edwards | 11/11/19 | 3a New Client review |
| Dawn Taylor | 11/11/19 | 2b Existing Client review |
| John Woodcock | 11/11/19 | 2b Existing Client review |

Tasks Types

| Task Type | No. |
|-------------------|-----|
| Overdue | 64 |
| Due Today | 5 |
| Due From Tomorrow | 7 |
| All Open | 106 |

Start | Version: 14.5083.10176.7

0330 102 8402

info@intelliflo.com | intelliflo.com

Our approach



They know their system inside out, understand how our business works and advise us on the most effective way to use Intelligent Office to get the best out of our business.

Maria Herrington,
Director of operations, Baggette & Company Wealth Management



Our expertise lies in using our financial services knowledge to help define, build and evolve highly effective solutions within Intelligent Office, for your business.

This relies on us having a deep understanding of the vision and strategy of our customers so that we can help develop programmes of change focussed on several of key areas:

- Compliance control and reporting
- Financial control and reporting
- Process effectiveness and management
- Proposition delivery
- Data quality
- Operational management
- Management information

0330 102 8402

info@intelliflo.com | intelliflo.com

Our customers

A successful customer relationship begins with us understanding your business requirements, but this is just the start of the journey.

As Sir Thomas Beecham said; "There are two golden rules for an orchestra, start together and finish together."

At Intelliflo we treat all of our customers as partners. We have a strong customer service culture based on providing both technology and support to deliver an effective business solution.



There are three stages to our customer journey



I fail to see how small and large businesses would be able to operate without the technology and the level of support you receive through using a system like Intelligent Office.

Andrew Oliver,
Andrew Oliver & Co Ltd.
Independent Financial Adviser

1 Objective

Our professional team, with extensive industry knowledge of financial services, works closely with our customers to identify their requirements. We will propose solutions which will enable real business efficiencies and cost savings.

2 Implementation

Using our project-based approach and experience of small to large scale implementations, we work through a defined process to ensure that all aspects of business readiness are covered. We know that implementing new processes can be daunting, so our experienced team works with our customers through each stage of the process.

3 Service

Our customer servicing teams support over 2,425 firms and over 22,700 users with assets under advice of £395 billion (as at 1 January 2019). This means that we have a wealth of experience in delivering exceptional levels of service and react to our customers' ongoing business needs.

Our people

**The key factor in
Intelliflo's success
is our people.**

**Our employees are highly
experienced in both financial
services and technology.**

This in-depth knowledge ensures that we are uniquely qualified to deliver the very best solutions to our customers. Our consultants and analysts continually improve their skills to ensure that we apply the most innovative and relevant solutions possible.

Most importantly we recognise that 'people buy people' first and a successful partnership is based around strong relationships. We are committed to working with our customers to understand their businesses and ensure we achieve the best possible outcome for them.



Intelliflo is populated by people who understand the financial services industry and appreciate what it is to be an adviser, helping to ensure our customers have a competitive advantage.

Nick Eatock
Executive chairman, Intelliflo

If you have any queries
relating to Intelligent Office,
please contact us on:

0330 102 8402
info@intelliflo.com
intelliflo.com
 [@IntellifloLtd](https://twitter.com/IntellifloLtd)

Intelliflo Limited,
Third Floor,
Drapers Court,
Kingston Hall Road,
Kingston upon Thames
KT1 2BQ

