CLIENT STORY:

Laurence Anthony

Customer profile

Laurence Anthony Associates are a Cheshire-based company that advises on whole of market for pensions, investments and protection. Founded in 1992, we are independent fee-based financial planners who help clients achieve their objectives. We don't use jargon and pride ourselves in giving unbiased, honest and clear advice, so our clients can be confident in the knowledge that the guidance we give is free from any conflict of interest.

We are constantly looking at technology to help us drive efficiencies throughout the business and improve client outcomes, so in March 2012 we moved to Intelligent Office (iO). Having been impressed over the following 12 months with what it could do for the business, we looked at the Personal Finance Portal (PFP) as a way to communicate more effectively and efficiently with our clients. We realised that it would be an incredibly useful tool to help our clients view their financial position when and where they want to, and see progress against the objections we had agreed with them.

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> ***The Personal Finance Portal is a fabulous visual tool. Since adding it to our service proposition, it's proven to be a success with clients and this has been reflected in the positive feedback we are receiving.***
>
> **Laurence Smith**
> Principal
> Laurence Anthony Associates

Business challenges

- Being able to communicate with all our clients cost effectively
- Being able to communicate with all clients securely
- Being able to segment our clients

What PFP delivered

- A very visual presentation of client holdings
- A positive feedback from clients as to the way we now communicate with them
- Improved our proposition and added value to our clients

LAURENCE · ANTHONY · ASSOCIATES

PENSIONS & INVESTMENTS

When we originally looked at using iO's PFP, we were immediately taken by the very visual and easy to understand client view. It clearly illustrates the client's investment position allowing them to see a snapshot of all their holdings and, if they want to, drill further into each contract they hold.

Also, through iO's electronic valuation functionality, client policies are always up-to-date and information is in real-time. This has been hugely beneficial, as it has eliminated a lot of administration time and therefore associated cost to the business.

Clients now go straight to PFP themselves whenever they want to find out what their current position is, instead of routing through us.

PFP has also enabled us to offer an improved service proposition to our clients. Most of our clients are used to online banking so to get a view of their financial holdings in a secure, online environment is a natural step. It has really made us stand out as a financial planning company offering something different and adding client value.

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> ***Clients can really see a value in using the Personal Finance Portal. It also cements in their mind the association with their finances and our company.***
>
> **Laurence Smith**
> Principal
> Laurence Anthony Associates

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