

# Personal Finance Portal

Helping you cut your client communication costs and saving you time and money



It's easy to under-estimate the time and cost of printing and posting hard copy client documents like suitability letters and portfolio reports. Often these costs are thought to be part of the unavoidable cost of doing business.

Now you can save significant amounts of time and money on stationery, printing and postage costs by using the Personal Finance Portal (PFP), as well as de-risking your business by using the encrypted, secure messaging facility.

## Example 1: A sole trader advice business could save over £665 per annum.

### Assumptions:

- ✓ 1 adviser with 100 fully advised clients
- ✓ Annual costs - £533.40 paper and printing, £19.80 envelopes, £111.60 postage
- ✓ Number of pages based on industry average
- ✓ Stamps 0.62p each, printing 0.21p per sheet, envelope 0.11p per pack\*

Types of document	No. of documents mailed	No. of pages printed
Fact find	50	30
Suitability letters	50	8
Portfolio reports	80	8
<b>Totals</b>	<b>180</b>	<b>2,540</b>

## Example 2: A small to medium sized advice business could save over £3,325 per annum.

### Assumptions:

- ✓ 5 advisers with 500 fully advised clients, in total
- ✓ Annual costs - £2,667 paper and printing, £99 envelopes, £588 postage
- ✓ Number of pages based on industry average
- ✓ Stamps 0.62p each, printing 0.21p per sheet, envelope 0.11p per pack\*

Types of document	No. of documents mailed	No. of pages printed
Fact find	250	30
Suitability letters	250	8
Portfolio reports	400	8
<b>Totals</b>	<b>900</b>	<b>12,700</b>

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*PFP has enabled us to make huge time and cost savings across the business.*

*For example, a client portfolio report in Intelligent Office takes a fraction of the time to produce compared to our previous system and we save on postage and paper as they are then stored electronically in the secure document vault of PFP for the client to see whenever they want to*

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David Reed, Director - Axis Wealth Management

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

\*Paper and printing costs based on data provided by HP



## Personal Finance Portal helps you reduce the risk of your clients becoming victims of identity theft through:

- ✓ Use of encrypted, secure messaging, giving you and your clients a quick and convenient way to exchange personal information online
- ✓ Ensuring all valuation data captured and displayed meets Origo security standards
- ✓ Providing a secure, web-hosted document vault for storage of important documents such as wills, policy documents, fact finds etc.



## Personal Finance Portal – puts you on the right side of the consumer trust equation when you:

- ✓ Explain how you treat your client's data with respect and enforce multiple security levels
- ✓ Let them know that you won't send information to them via post or regular email as they can be intercepted
- ✓ Notify them that you've made the client portal and app available so they receive data and documents securely

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*PFP satisfies the regulator's secure messaging requirement. We can email our clients directly and securely through the portal and a record of this is automatically saved in the client's file. This means that we can always track our client communications.*

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Kylie Lambert

Mercier Allen and Associates Ltd

