

Intelligent Office for mortgage brokers

Business management software for mortgage and protection brokers



Overview and benefits

Intelligent Office is a fully secure end-to-end sales and compliance business management software for mortgage and protection brokers. This 'one-stop shop' lets you manage all your client and provider data, within a single technology eco-system, aligning it to your service proposition while delivering vital management information and insights on your business.

Huge time and cost savings

Intelligent Office provides huge time and cost savings to your business, by streamlining your processes with any of our 100+ 'best of breed' integrations, including popular quote portals such as Trigold, MortgageBraid, iPipeline and The Exchange. Intelligent Office provides the ability to quote, apply, record and service your clients at the touch of a button. To see the complete list of all our integrated partners, take a look at www.intelliflo.com/iostore.

Built in flexibility to use the tools you want

The system is scalable, meaning it works for any size of business or distribution model. Using our Open APIs, you can add and completely tailor what you use to meet your business needs and create a bespoke experience. As Intelligent Office is a cloud-based software, your data is backed up safely and securely and is accessible 24/7 from any location and makes a working day using Intelligent Office extremely flexible.



Glia technology enables you to meet your clients in a virtual space securely, be it via text chat, audio or full video link up, as well as discuss and share documents like KFDs and suitability reports. Using our Glia integration via the client portal, enables you to ensure compliance with regulations like GDPR and MiFID II.

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Intelligent Office and the Personal Finance Portal have bought business benefits we hadn't originally imagined. Our clients tend to be busy people who don't really have time to leave work early to spend a couple of hours with a mortgage adviser. If they can view the information and interact with us from home via a secure, online hub, that saves them a lot of time.

Kelly Wicks - technical director, Kinleigh Folkard & Hayward

Intelligent Office features



Learn more

If you would like to find out how **Intelligent Office** can help your business, or if you have other related questions, do call us on **0330 102 8402** or email us at sales@intelliflo.com where one of our executives would be pleased to help you further.

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