

Voyant – cashflow modelling and financial planning software



Intelligent Office (iO) has linked with Voyant - a state-of-the-art financial intelligence presentation and collaboration platform developed by Voyant UK.

This powerful platform for presenting cash flow, investment, tax and estate/IHT planning is capable of pulling your client data direct from iO giving you more time to focus on generating new business and managing your existing client base.

Benefits for you



The combination of enhanced fact finding in iO with Voyant's state-of-the-art platform makes complicated financial planning calculations and modelling easier and more presentable in front of your clients.



Retrieving data from iO removes the need to fact find in multiple places and makes rekeying data a thing of the past.



Making use of iO's integrated valuations from providers allows you to pull up-to-date plan valuations from iO into Voyant for accurate planning.

Voyant - key features

Cashflow planning

Forecast clients' income and expenses, as well as their assets and liabilities, throughout their lifetime.

Investment planning

Determine how to invest current assets and future savings based on clients' financial goals, attitude to risk and current financial position.

Tax planning

Develop a plan aimed at minimising the amount of tax payable while complying with all the relevant tax legislation.

Estate/IHT planning

Demonstrate how to eliminate uncertainties and maximise the value of an estate by reducing taxes and other expenses.