Personal Finance Portal

Helping you to build your business through automated advice

Intelliflo

Helping you to grow your business through automated advice

As an adviser, you know how vital it is for consumers to prepare for their financial futures. However, full face-to-face advice is costly for you to deliver and some consumers are reticent to pay these costs. Now there is a way to provide cost-effective advice to help many more consumers build a savings pot for the future – by offering automated advice online, through the Personal Finance Portal (PFP).

PFP's automated advice option means that you can provide a light-touch, self-service option for clients who want to buy basic investment products online, for example, employees or early savers who want to invest in an ISA or a General Investment Account. It can help you:

- ✔ **Maximise your orphan client banks cost-effectively**
- ✔ **Access new client segments e.g. the next generation of clients, 'wealth in waiting'**
- ✔ **Provide a low cost, self-service option whilst maintaining the client relationship**
- ✔ **Provide an 'Omni-channel' service and trading platform**
- ✔ **Build a more profitable business**

The option incorporates attitude to risk, capacity for loss and investment projection tools, allowing clients to experience a fully online, automated process. Plus it's all offered as part of your wider advice service, helping you establish cost-effective relationships which can become more profitable in the future and secure your new business pipeline.

How does it work?

You choose from a suite of risk-rated default investment solutions and the trading, execution and payment will be facilitated entirely online through the secure PFP.

There are easy to use risk profiling tools, and resulting client investments will be available for you to view so you can monitor activity.

All client selections and investments have a complete and comprehensive audit trail with the ability for you to set up 'stop scenarios' so you can intervene to ensure clients are making wise decisions based on their financial situation.

The whole process is recorded in Intelligent Office for compliance and reporting, making it quick and easy to administer and the client can link to goals and track their progress.

You can interact digitally with clients via online face-to-face meetings, allowing you to securely share and view documents such as product options and investment risk mapping, safe in the knowledge that all of these 'virtual' conversations are automatically recorded for regulatory purposes.

The cost of the online investment service will be transparent to the client so they can make an informed choice before using it, and your own charge for the service is entirely flexible.

You can reinforce your brand by white-labelling the site with your corporate logo and colour so it's clear who has provided the service and it's fully online - there's no paper involved!

Management information shows those consumers who have gone through the automated advice process so you can always pinpoint the type of business transacted.

So why not let the Personal Finance Portal's automated advice function help you grow your business and transform your bottom line whilst supporting you in helping new clients achieve their financial goals in a modern and efficient way.

Visit: intelliflo.com/pfp
or call us on: 0845 230 3800
to book a demonstration today.

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