

Fact sheet:

CoBrowsing technology through the Personal Finance Portal



Intelliflo's integration with award-winning SaleMove technology, offers the option to interact digitally with your clients via virtual face-to-face meetings through the Personal Finance Portal (PFP), allowing you to:

- Choose chat, audio or full video conversations in real time
- Provide a secure environment for CoBrowsing - sharing and viewing financial information such as review documents, product options and investment risk mapping
- Integrate with the PFP and store all conversations securely against the client record

Key benefits:



Time saving - Traditional face-to-face meetings are time intensive for both you and your clients, but having personal interaction is one of the foundations of your service. The ability to speak face-to-face with a client via a recordable digital format saves time whilst enhancing the client relationship.

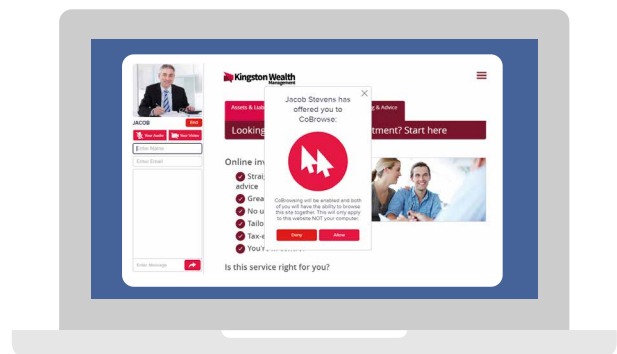


Risk management – All contact is stored securely for future reference, meeting the requirements of MiFID II when it comes into force in 2018.



Meeting modern client service expectations – Automation is a cornerstone of the future client experience and the speed/security of this functionality allows you to meet client expectations for online communication in an engaging and efficient way.

SaleMove



About SaleMove:

SaleMove enables organisation to engage their online visitors in the same way they would engage them in person. Using SaleMove's enterprise SaaS platform, businesses engage website visitors using video, audio, chat and CoBrowsing without the need for downloads or installations.

After receiving Series A funding from Tola Capital and Wildcat Capital in August 2015, SaleMove went on to win Best of Show at FinovateFall 2015 (NYC) and FinovateSpring 2016 (San Jose, CA). Additionally, in April 2016 the company was awarded the EFMA Special Award for its Engagement Platform and excellence in Customer Experience.