

BENEFITS TO YOU

- A clean and consistent client database
- Efficient and cost-effective communications
- Helps win new business and increases sales to existing clients
- Reduces cost by removing paper and improving workflow
- Accurate cash-flow forecasting
- Increases client satisfaction and retention
- Allows you to service more clients more profitably

BENEFITS TO YOUR CLIENTS

- One login to everything financial
- View their investments automatically updated at anytime
- Alongside all of their other finances including their banking, property and insurances
- Organises all the paperwork
- Helps with financial peace of mind – everything organised and accessible
- Relevant and accessible news and information
- Makes their life easier

“This is way cool and (so far as I know) unique in the industry.”

Mark Polson, the lang cat

 moneyinfo



 moneyinfo

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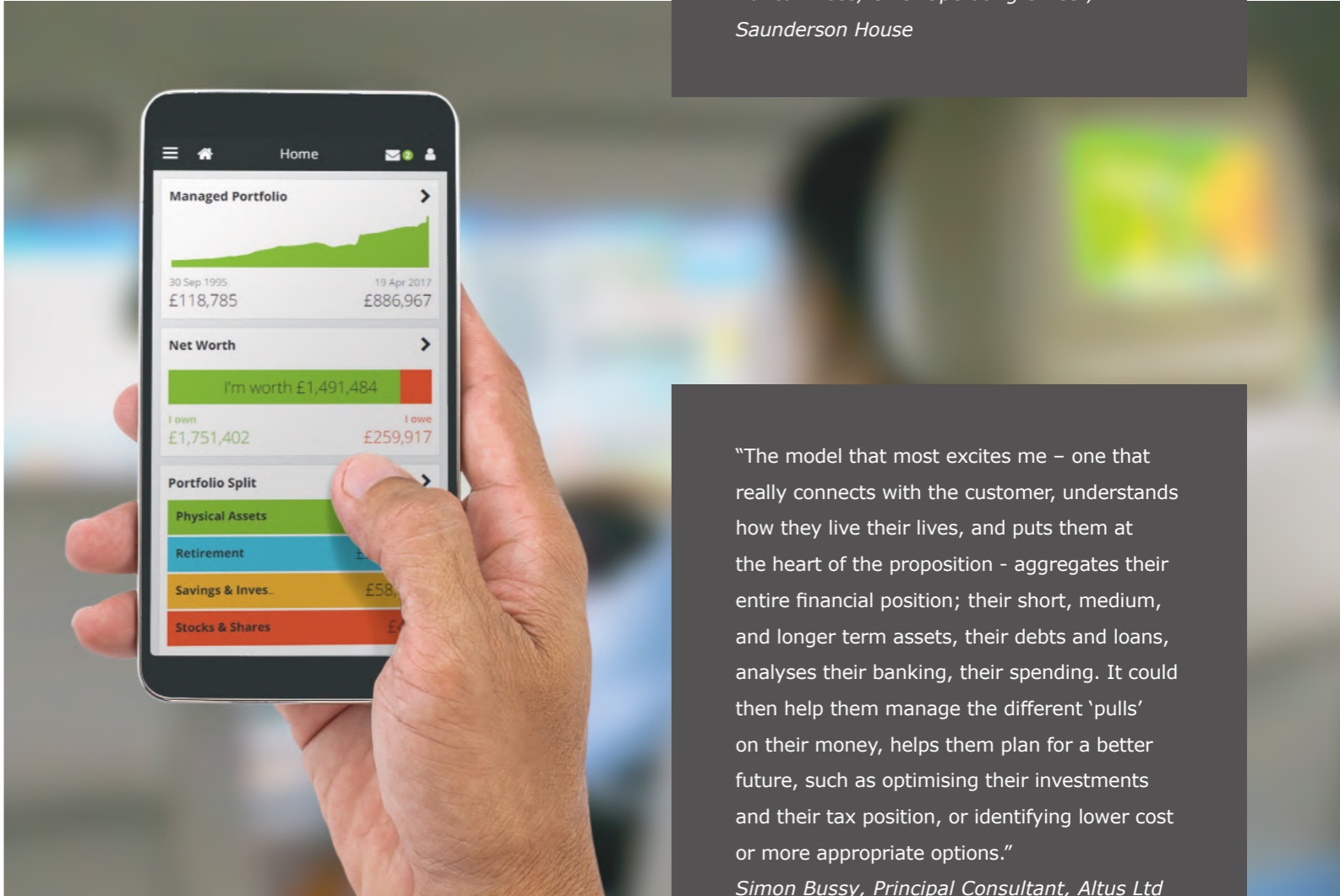
SEE THE BIGGER PICTURE



moneyinfo is the most technologically advanced client portal that allows your clients to view their entire financial life, whenever and wherever it suits them.

Deliver your clients the app they want to manage their finances, all beautifully presented under your brand.

"Providing our clients with the ability to access important information about their financial affairs at a time and a place of their choosing is a fundamental requirement in today's busy world.
Duncan Ross, Chief Operating Officer, Saunderson House



"The model that most excites me – one that really connects with the customer, understands how they live their lives, and puts them at the heart of the proposition - aggregates their entire financial position; their short, medium, and longer term assets, their debts and loans, analyses their banking, their spending. It could then help them manage the different 'pulls' on their money, helps them plan for a better future, such as optimising their investments and their tax position, or identifying lower cost or more appropriate options."
Simon Bussy, Principal Consultant, Altus Ltd

EVERYTHING IN ONE PLACE
 Give clients easy access to all of their finances including their investments, savings, pensions, banking, credit cards, mortgages, property and insurances together with all of the associated paperwork. All organised and in one place.

WHITE LABELING
 moneyinfo can be fully white-labelled. It's not just incorporating your colours and logo, every screen, function and control can be customised to meet your exacting corporate standards.

PORTFOLIO

- Daily updated valuations
- Visually appealing
- Easy to follow
- Handles custom asset allocations and complex investments

DATA CLEANSE
 Outsource the hassle of account aggregation to us and we'll provide you with clean, refreshed and up-to date client data overlaid with data from platforms & providers.

BETTER FINANCIAL PLANNING

Income and expenditure transactions are analysed directly from bank accounts, credit cards and store cards to provide accurate data for your cash-flow plans.

"The client feedback we have received has been extremely positive."



PAPERWORK SORTED

Remove the time and cost of producing and mailing paper reports, let your client access their information on demand.

DOCUMENT SHARING

Two-way document sharing removes the pain of filing for your clients and allows them to keep all of their important documents safe (in case of an emergency).

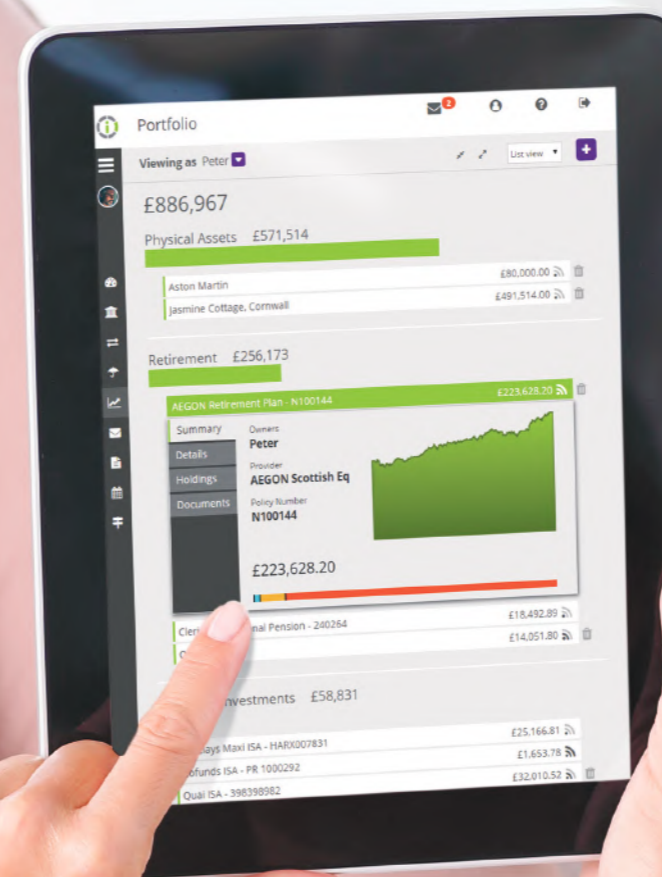
"We needed an experienced digital partner capable of representing us in the right way. The moneyinfo team have helped us to very quickly launch an impressive digital platform and app putting us front and centre for our clients' minds for anything financial. The client feedback we have received has been extremely positive."
James Priday, Prydis Wealth

POWERFUL DATA VISUALISATIONS

How much of our industry reporting is for the adviser's benefit or to ensure compliance? moneyinfo shows the information that clients want to see - how much is it worth and has it gone up or down?

RELEVANT NEWS AND INFORMATION

Deliver your own custom content directly to your clients via our integrated content management solution (including videos, images, news).



SINGLE SECURE LOGIN

Bank level encryption keeps your data safe and 'view only' technology means neither you nor anyone else can move or transfer money.

SECURE 2-WAY COMMUNICATION

Secure messaging with alerts makes collaboration between you and your clients secure and easy.

ALERTS AND TRIGGERS

With an intuitive interface and familiar Facebook type notifications, clients will value proactive and regular comms accessible when it suits them.

MAKE LIFE EASIER

With fully branded apps available for both Apple and Android, your clients have the power of moneyinfo from the convenience of their pocket.



"I'm pleased to say the moneyinfo team delivered on their promises, helping us to launch a technologically advanced, client friendly solution that meets our exacting standards."

*Duncan Ross, Chief Operating Officer,
Saunderson House*

EVENTS CALENDAR

Never forget important financial dates, premiums due, income receivable, insurance renewals and policy maturities with the Events Calendar.

RE-IMAGINE THE FACTFIND

moneyinfo provides a truly efficient process for gathering the key facts required to drive advice. What's more we make the process fun and interactive for your clients so keeping the data up-to date is easy.

FAMILY BALANCE SHEETS

View client, partner, dependants, trust accounts, buy to let investments and corporate accounts together on a single screen for a complete family balance sheet.

PEACE OF MIND

Imagine the benefit and reassurance for your clients of knowing that all their financial information is in one place ... should the unthinkable happen.

