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We are offering clients something special which differentiates us... what we have saved on postage and printing has already covered our annual licence fee, regardless of all the other benefits.

Alan Beaney -
Chief Investment Officer
R C Brown Investment Management

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 moneyinfo

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sales@moneyinfo.com

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 moneyinfo

A better client experience

for financial advisers, wealth managers and DFMs

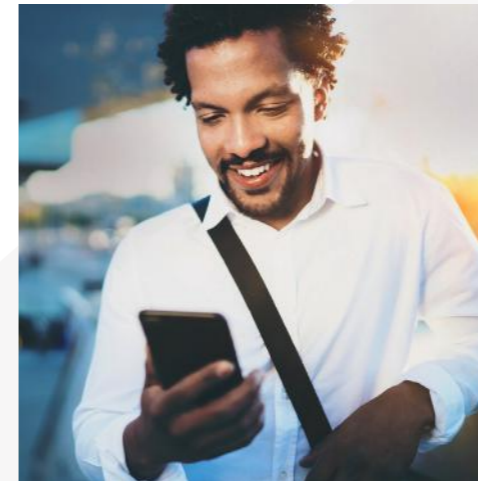
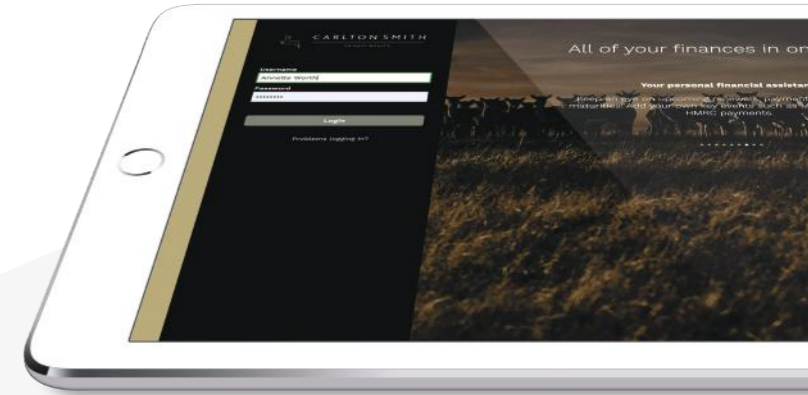
The portal your business needs, and your clients want

Re-imagine your business taking full advantage of a digital service channel to deliver a better client experience, remove paper and unlock significant cost and efficiency savings.



Brand

moneyinfo is delivered fully branded for your business including branded apps for Apple and Android. Every screen, function and control can be customised to meet your exacting corporate standards.



Manage

Our comprehensive portal management ensures that you and your teams have complete control over your moneyinfo service. From on-boarding your clients, to managing custom content to secure communications and much more.

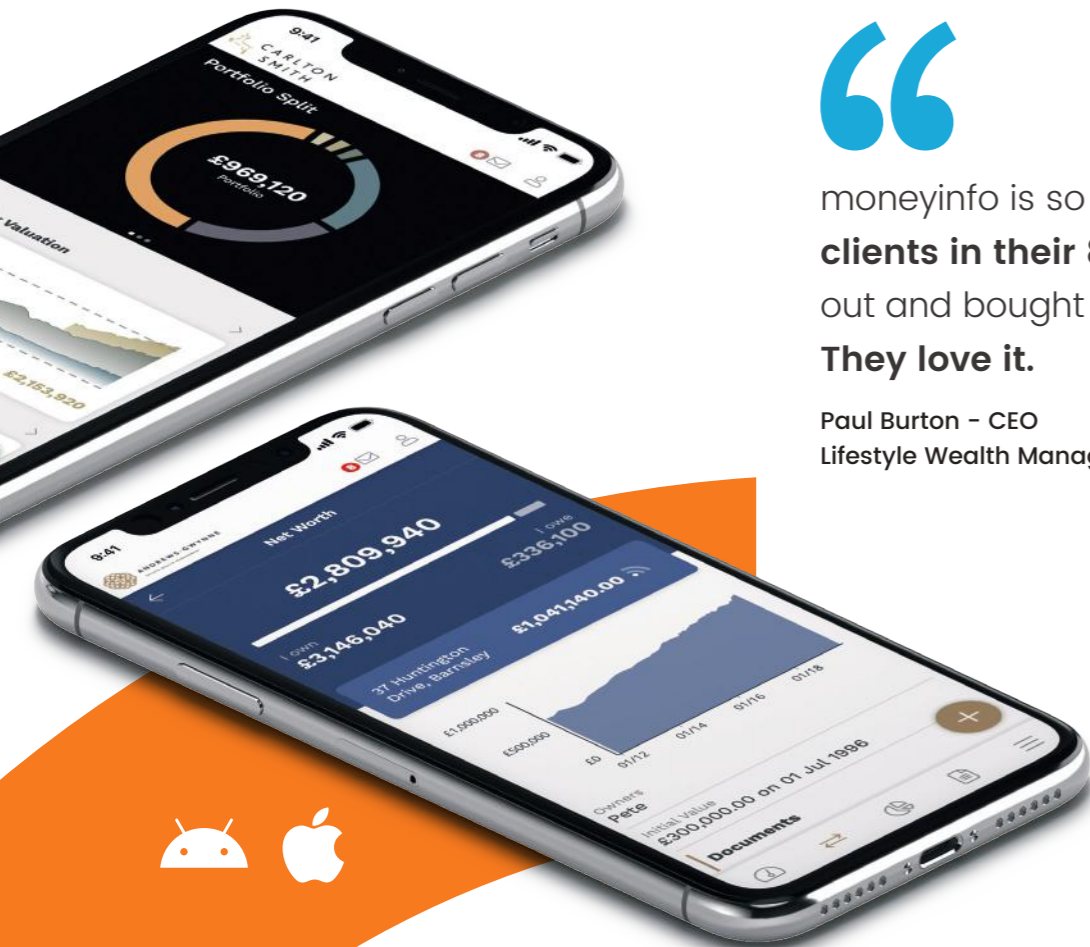
Mobile

Give your clients access to your service on their smartphones and tablets so they can interact with you from any place at any time.



Your brand in their pocket

The use of mobile devices to access online services has overtaken PCs and Laptops. Clients want a single app to manage all their finances, on the devices they're using. Make sure that app is yours.



“

moneyinfo is so easy to use. I've got **clients in their 80's** who have been out and bought iPads just to use it. **They love it.**

Paul Burton - CEO
Lifestyle Wealth Management

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The completely paperless office

Secure communications with two-way document sharing and e-signatures, removes paper and effortlessly enhances your everyday business processes for onboarding, client reviews and portfolio rebalancing.

Automated reporting

Reports can be delivered automatically. Clients get a notification on their mobile that they have a new report and you can track receipt and when the report is opened.

“

We recently **onboarded a new client** from Australia, including completing his SIPP application **within 24 hours** which was absolutely fantastic and would have taken weeks before moneyinfo.

Samantha Teale - Office Manager
Andrews Gwynne Private Wealth Management

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Managing made easy

moneyinfo manager ensures that you and your team have complete control over your digital service. Monitor and access usage, communications, AUM and more via your own data warehouse.



“

moneyinfo has a really powerful portal admin – **a key market differentiator** that no-one thinks about when they go to buy a portal.

Cyrus Mehta – Project Lead
Saunderson House

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Complement your existing investment

We appreciate you've got data in existing systems, suppliers, platforms and providers that you need your portal to work with. moneyinfo will complement your investment in IT, making your existing systems more efficient.

Outsource your data management

With our built-in aggregation with platforms, providers, bank-accounts, stock-trade accounts and back offices we'll provide you with clean, refreshed and up-to-date client data.

“

We've had a **35% reduction** in office expenditure thanks to moving from paper and email to secure digital communication.

Nigel Bromwich – Managing Director
Bromwich Financial Planning Limited

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