
moneyinfo
Game-changing
client engagement
moneyinfo
9m ago
We're on a mission to make the wealth management community be the best it can be, by taking client engagement to the next level, one ambitious firm at a time.
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Contents

What do we do?

A client portal that's always mobile and always in your brand. With nearly four times as many logins as a traditional web-based client portal our fully branded apps build client loyalty, improve profitability, and deliver compliance confidence.

Who do we do it for?

Ambitious, forward-thinking, client-centric advisory and wealth management firms, with an appetite to move with the times.

How do we do it?

With the perfect blend of technology, people and principles. Our approach begins with your client and works back from there, drawing on our unparalleled understanding of the adviser process, constantly listening, actively collaborating, continuously learning.

Why do we do it?

As technology permeates every aspect of our lives, the financial advice and wealth management community is falling behind. We're here to change that. We're here to take the industry's collective game to the next level.

We are

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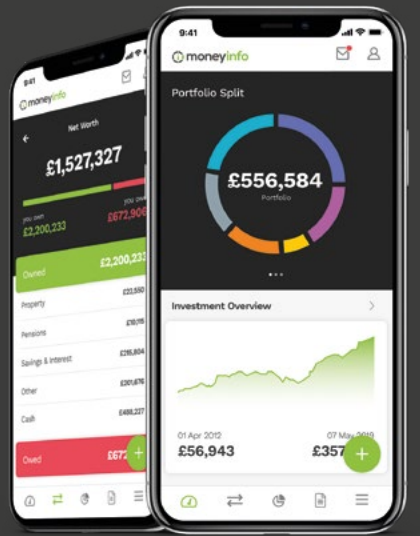

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Enhanced loyalty

21st century service experience

Complementing your service and reflecting your brand perfectly, our client portal puts your clients at the heart of your proposition. Building trust, increasing engagement and enhancing client loyalty.

Fully branded apps for Apple & Android

It's your brand they trust and it's your brand that your clients download from the app stores, not a third-party brand they will not recognise.

Always mobile

Provide access to your service via all the devices your clients use – their smartphones, tablets and computers so they can interact with you from any place at any time.

Flexible

We integrate with Iress, Intelliflo, Curo, Pulse, Pershing, iMix and many bespoke systems giving you the flexibility to use the technologies that best suit your business and switch technologies without affecting your client experience.

Building trust

Nothing is more important than the trust your client has in you. A moneyinfo app repays that trust, demonstrating that you are taking their data protection seriously.

Financial peace of mind

Secure access for your client to all their finances and associated paperwork adds to your client's financial peace of mind, complementing the service you provide.

"We've been using moneyinfo for a while now and our clients love it!"

Toby Ellington
Equilibrium Financial Planning

Your brand in your client's pocket

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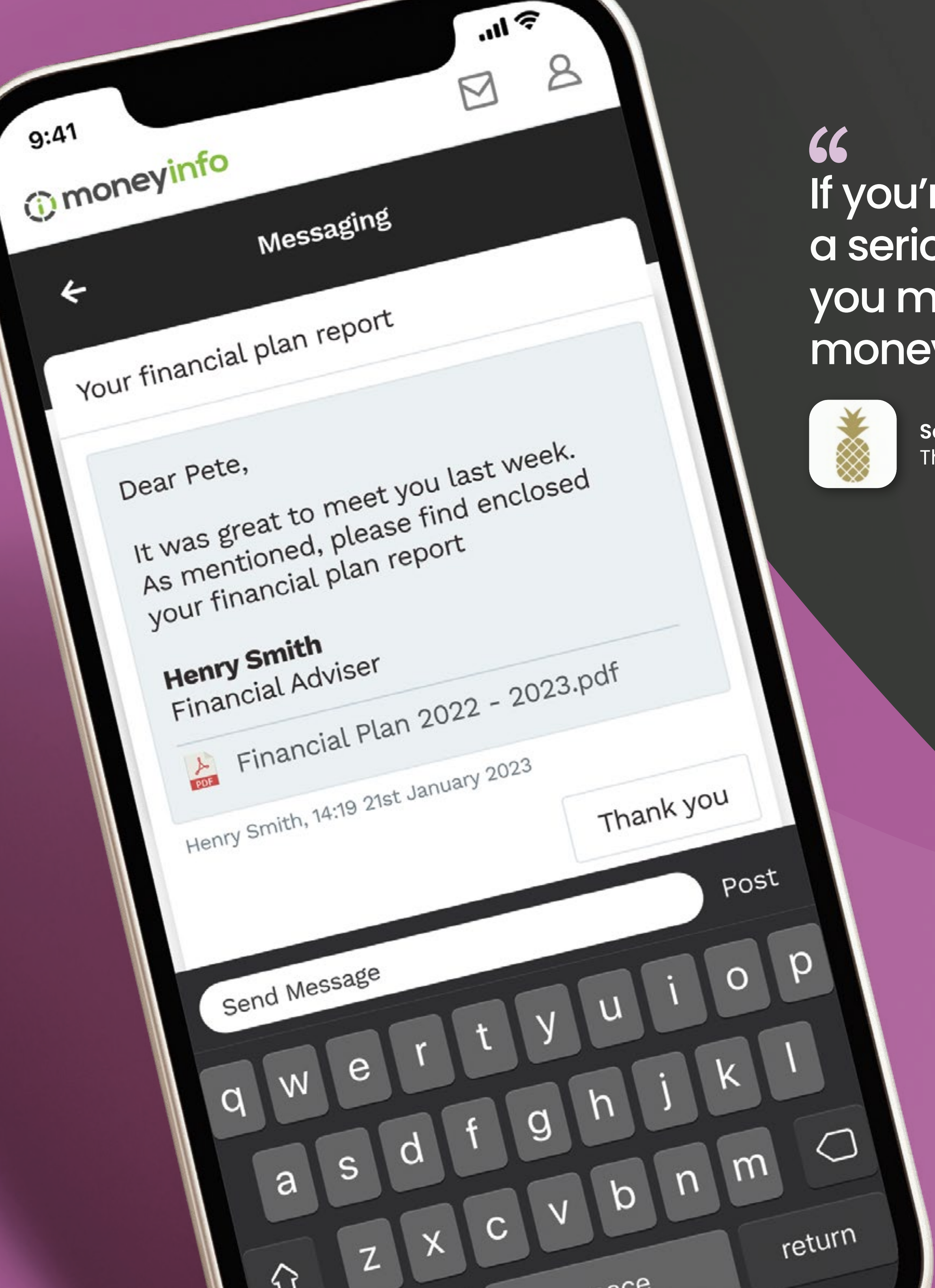


"If you're running a serious practice, you must have moneyinfo"

Sam Whybrow
Thanks Wealth Planning

Compliance confidence

Secure & auditable

moneyinfo is secure and encrypted, so your clients' data is always protected. And with a full audit trail, you get total compliance confidence. Peace of mind for you and your clients.

Better than special delivery for all your communications

End-to-end encrypted messaging keeps personal data away from the insecurity of email and unreliability of the post.

'WhatsApp' style secure messaging

Message threads make our secure messaging as easy to use and familiar as WhatsApp whilst message templates ensure the consistency of your message.

Digital Signatures

DocuSign is delivered through our secure messaging, keeping personal data away from email and protecting your clients from phishing.

Shared audit trail

A shared audit trail, for both you and your client, of all correspondence ensures there is never any doubt about what's been said.

MIFID II

Market fluctuation notices and all your other regulatory reports can be automatically delivered in seconds and monitored to make sure they are read.

Measuring client feedback

Integrated Net Promoter Score helps you understand how clients see your service.

Data Privacy as standard

Secure GDPR compliant privacy controls give your clients the confidence to upload their own data.

ISO 27001 certified

We are ISO 27001 certified, independently audited to ensure we take the best care of your personal data.

Improved profitability

Automated & efficient

We make every single touchpoint more efficient. Less paperwork, automated reporting and full integration with your platforms, providers and the other technologies you use. Saving you time and improving your profitability.

Process automation

Supercharge your everyday processes from onboarding to client reviews with our advanced workflow automation.

Share and sign paperwork securely and easily

You need to get all your clients to accept your revised client agreement which can take weeks and cost a fortune in time, printing & postage. Do it in minutes via an e-signature template.

Digital Fact Find

Collaborate with your clients to capture and update their financial review.

Fully Automated Reporting

Automate the delivery of your reports with configurable filing, delivery, notification and monitoring.

Custom content delivery

Your newsletters, articles and videos can be instantly delivered for your clients to access wherever and whenever it's convenient.

Data management

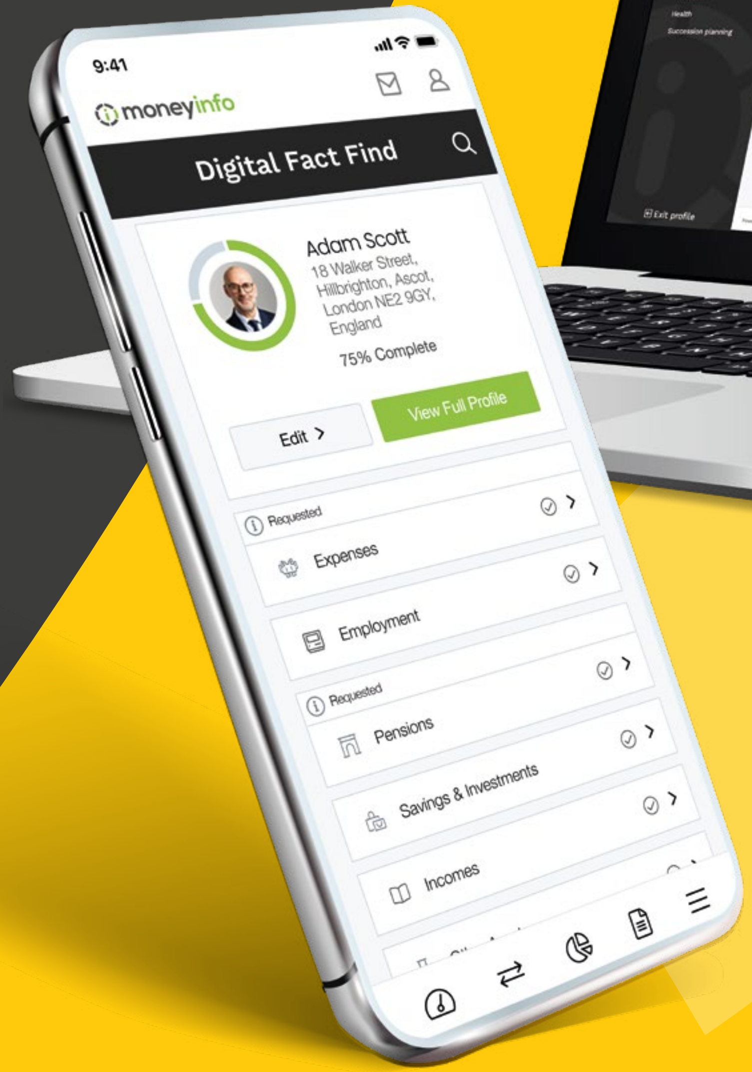
We manage all your platform and provider feeds for you, ensuring you have access to the latest valuation data.

Open Banking

Clients can track their income & spending delivering accurate information for cashflow planning.

Account aggregation

Give your clients access to all of their finances in one place and bring those held-away assets under your brand.



> The only limit to what it can do is you

Louise Carter
The Private Office

“What really sold it was the people...”

Matthew Clark
Old Mill

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Building together

Collaborative approach

Always listening and actively collaborating. Responsive telephone support, free training, regular User Forums to encourage idea sharing and your dedicated adoption manager ensure we build the perfect solution together.

Support and training is included

We offer ongoing support and training to ensure your business can make the most of our technology, all included within your licence fee.

Free training

Yes it's free, delivered when you need it and throughout the lifetime of your investment in our technology.

Dedicated Support & Adoption

From the moment you become a client, you'll always have someone to speak with who knows your business and can help ensure your implementation goes smoothly.

Annual User Forum

A chance to meet with fellow users, see the latest developments and talk with connected technology suppliers & providers.

Communications Library

A library of content including video tutorials and message and communication templates for you to use whenever you need.

Collaborative development

Our clients are our best resource for developing new features. Regular user forums and client meetups encourage our users to collaborate and share ideas from which we all benefit.

Phone-first approach

We love to talk with our clients. Email has its uses but nothing beats having someone on the end of the phone helping you.

Future ready

Supporting the hybrid adviser

Game changing client engagement. Constantly evolving to give you the best possible solution for your clients, now and in the future

Integrated

Bulk valuations, contract enquiry, API and SSO make integrating moneyinfo into your existing and future infrastructure painless.

Constantly innovating

With biometric access – face recognition & fingerprint, in-app scanning and WhatsApp style communications our technology performs the way your clients expect.

An app for your advisers

Access for your advisers to the latest client data and communications, securely and easily accessible through an app on their smartphone.

And an app for your introducers

Keep personal data secure and connected third-parties in the loop with access for trustees, introducers and professional connections.

Multi-currency

Hold accounts, plans and holdings in any currency and report in the currency of your client's choosing.

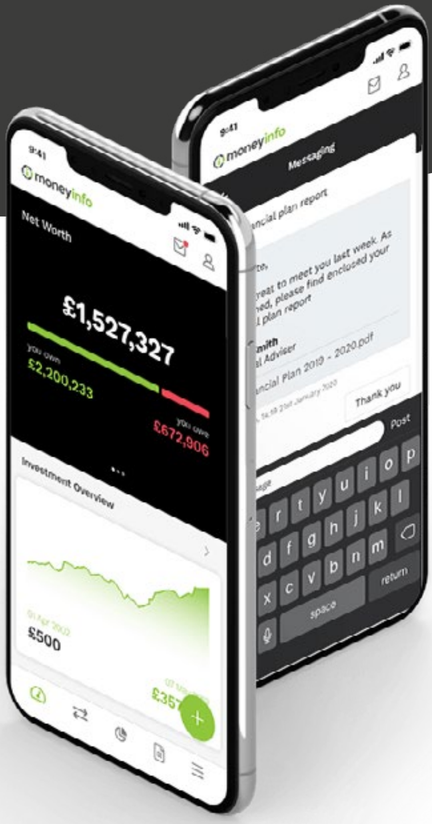
Multi-generational

Client, Partner, Dependents, Trusts and Business Accounts can all be created, linked and managed together.

And ready for the next generation

Build a relationship with your client's children by helping them manage their finances through your app.

> "Light years ahead of the pack"
>
> **Tom Skinner**
> Barnaby Cecil Financial Planning



Want to find out how moneyinfo can **help your business?**

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ISO 27001

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