



## Case Studies: Concept Financial Planning



Paul Richardson, Managing Director at Concept, says:

“IntelliFlo is at the heart of our customer focused proposition, it is not a system that we only use 30% of the time – everyone at Concept Financial Planning understands the benefits that it produces both for the business and our clients. It is great to be working with a company that relishes the challenges that financial services poses and that delivers excellent customer service to us.”

Concept Financial Planning Ltd was established in July 2007 with a forward thinking approach to financial planning. Our vision was to offer a customer focused proposition that we could deliver to market – the only way this could happen was to make sure that technology was at the heart of the proposition. This would allow the advisers to concentrate on providing professional advice and leaving others in the team to focus on the support and administration.



We conducted our in house due diligence on numerous software providers, we wanted a system that could be implemented with ease and one which could be used to its full potential. In effect, we wanted to build our own independent back office ‘wrap’ system with the ability to hold legacy business from clients and report on this.

We had a number of aims that the system had to deliver:

- Building processes to allow a compliance audit trail
- Third party links into the system reducing manual intervention
- Ease of obtaining Management Information data
- Ease of recording fund information and asset allocation details
- Producing quality client facing reports
- Simple to use

#### Solution

- Fully intergrate IntelliFlo into the heart of Concept Financial Planning without exception
- Train all staff on the ease of use and the benefits

#### Results

- Business is streamlined
- Advisers can focus on advice
- Management Information is easy to extract for compliance purposes
- Production increased

In a financial world which is changing everyday it is paramount we work with a company that is also forward thinking and that can help us deliver the service that our customers deserve and expect.

We are very impressed with the training we have received and developments that IntelliFlo has made in the short space of time we have been working with them. We are trialling the use of various beneficial additions to the system which will further enhance our customer focused proposition.