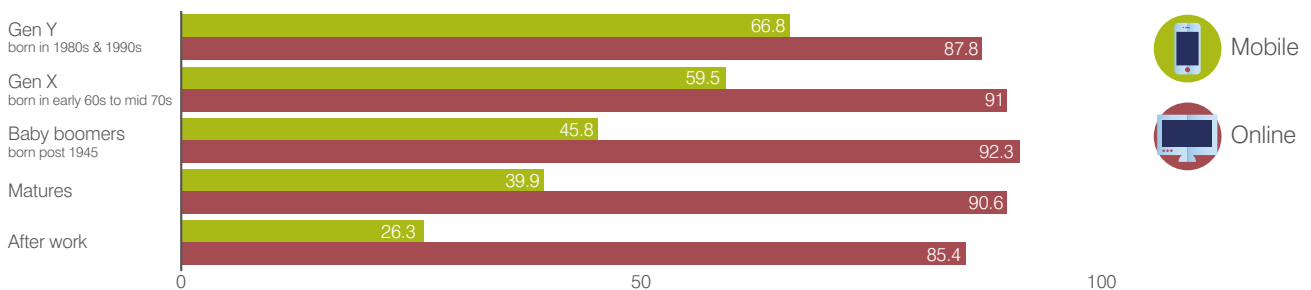


# Personal Finance Portal

## Consumer attitudes to online finance are changing - does your proposition stand-up?

Consumer attitudes to financial management are changing. A recent survey conducted by the Office of National Statistics showing 53%\* of those polled regularly access their bank account online. Consumers increasingly want to interact with advisers and product providers across multiple channels, face to face, by telephone, via the web - or a mix of all three. So how can you adapt your proposition to provide a digital service and how can Intelliflo support you?

### Use of online or mobile banking services\*



Combined proportion of respondents who are 'currently using' or 'considering using' online or mobile banking services



### Top 10 benefits of the Personal Finance Portal (PFP) for you and your clients

- ✓ Improve client engagement with a web-based tool which matches modern service expectations
- ✓ Create a single, powerful online financial management hub which integrates clients' long-term saving and investment information with short-term bank account and credit card data
- ✓ Cut servicing costs by providing increased automation of tasks
- ✓ Create business opportunities by viewing aggregated information of both advised and non-advised products e.g. loans and protection
- ✓ Meet regulatory and legal requirements for information security by facilitating secure messaging between you and your clients
- ✓ Save time by automatically pre-populating fact find data
- ✓ Keep abreast of developments by getting up-to-date portfolio valuations at the touch of a button
- ✓ Reinforce your brand and offset provider bias by white-labelling the site with your corporate logo and colour
- ✓ Use inbuilt campaign management tools to market to your clients as well as new prospects
- ✓ View information on multiple devices e.g. laptop, tablet and mobile 'phone



### Industry expert gives thumbs up to Intelliflo's new client portal

Independent financial technology industry expert, Ian McKenna, reviewed PFP in an article published in Money Marketing magazine. In the piece he says that "Intelliflo appears to have cracked the issue of how to deliver digital relationships that compliment traditional services".

► [To read the full article click here](#)

\*Source: PWC Digital Tipping Point Survey 2011