

advisercloud

BACK OFFICE CLOUD SOFTWARE FOR IFAs



Make your IFA business
more **effective & profitable** with
Adviser Cloud software



Risk Free &
Transparent Costing



Reconciliation of
E-Commissions



Intuitive Task
Management



Cloud-Based Secure
Document Storage



Customisable
Fact Find



Custom
Workflows



Live
Valuations

Our fully cloud-based IFA system is simple, straightforward and above all flexible.

We understand that not every financial company works the same, and at Adviser Cloud we've developed our fully cloud-based IFA system around individual needs, not pigeon-holed ideals.

Why choose Adviser Cloud?

We offer **flexibility** as standard - there is no 'one size fits all' solution. Adviser Cloud is customisable and set up to function around how you and your business work.

- Developed with IFAs for IFAs
- Built with API's & Connectivity tools that make it simple to manage clients
- Regular Ground-Breaking Software developments, updates & improvements
- Automatic Updates for all users included in the monthly cost
- Future thinking, innovative & creative software developers
- **Unlimited Document storage** included at no extra charge.

Main features



Reconciliation of E-Commissions

- Automatic Live Commission feeds with many Providers & Platforms such as **Nucleus & Standard Life**
- EDI statements come into adviser cloud as soon as they are released by providers and they can also be uploaded in real-time
- Administrators reconcile **only** the unexpected amounts (Manual Override)
- We can dramatically reduce the time it takes from **days** to only **minutes**.



Revolutionary Live Valuations System

- An efficient, fluid and slick valuations system that responds to platform errors with retries
- Enabling 'one-click' valuation requests, providing unparalleled power to produce valuation reports via Platforms such as **Nucleus & Transact**.
- Adviser Cloud downloads the latest values & transactional data automatically at a set time of your choice or manually with **one click!**



Simplified Reporting

- Adviser Cloud streamlines the production of **RMAR** and other **GABRIEL** reports required by the **Financial Conduct Authority**
- Reports available include: Valuation reports, Commission reports, Client facing review packs, Fact find reports along with Rich MI reports & lead generation reports.



Client Review - RMAR

- Review Reports at your fingertips
- Automatic review alerts sent by email
- Send SMS Reminders to Client's regarding review appointments
- A Contact Log plug-in to record client email contact helping to fulfil your **RDR obligations**
- Client facing review packs with commissions overlaid over investment and asset value
- Automatic/Manual hybrid alert system, giving you the best of both worlds.



Document and Task Management

- Adviser Cloud is designed to work around daily tasks by managing, automating & streamlining the advice process, with automatic reminders, custom workflows, task management and time logging
- Store all your client files, including; signed terms of business, key features, fact finds, copy letters and quotes, using **secure online (unlimited) storage**.



Customisation and Personalisation

- Fully customisable **fact find** modules to suit your business needs
- Fact find invitations can be emailed to clients at the click of a button where they can then complete and see a snapshot PDF
- Custom workflows for you and your team
- Your company branding and logo on the Adviser Cloud log in screen.



Highly competitive costs

- On a 6 user contract Adviser Cloud can save your business up to **£7,000 in the 1st year!**
- Transparent & straightforward price structure
- Access to online client support portal.





A forward thinking company

Adviser Cloud is the UK's newest provider of Software for Financial Advisers and our software offers many functions to help with acquisition, management and review of clients along with commission management, live valuations, custom workflows & automated reporting.



So... what are you waiting for? Join us today!

call 03330 144 490 [email hello@advisercloud.co.uk](mailto:hello@advisercloud.co.uk)
or visit www.advisercloud.co.uk

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