10% discount

IFA Systems can give you the tools you need to build a powerful and effective website

When we create or develop our web-based modules, we can never know exactly how our clients are going to use them, as each firm has a different way of working. This was especially true of AES International, who contacted us out of the blue one Friday afternoon in 2009 to talk through our Portfolio Adviser secure on-line reporting tool.

AES International supports a growing number of overseas financial advisory firms who need help servicing clients with cross-border or multi-jurisdiction requirements. AES are fully licensed for financial transactions in all EU areas and are familiar with the specific requirements of all major countries.

The Portfolio Adviser module enables AES to upload a snapshot of details of selected clients (from data held in a local copy of their Adviser Office) to a secure area of their website. Each client can then log in and view their details at any time of the day, from any location. This feature is especially useful for AES, as 95 per cent of the clients they service live overseas. It means that the data is available as soon as uploaded, without the need to print and post bulky reports, in a simple and straightforward format.

Sam Instone, managing director of London-based AES, says: “We find the system very easy to use, both for ourselves and our clients. We looked at a number of different solutions before choosing IFA Systems’ services, as we found they provided just what we wanted.

“Beside their portfolio module, we find the other features offered by IFA Systems to be extremely useful. In particular their secure messaging system enables overseas clients to contact us when it suits them (they often live in different time zones to the UK), and know we will action their requests when we start work the next morning. We find the asset allocation tools, the attitude to risk and the fund analysis reports offered through the website unique and very informative.

“At their first meeting with a new client our intermediaries show them a demo login through our site of the features that we will be offering them once their portfolio is set up, so that they are familiar with how to navigate the screens and what they contain, including where we will store personal documents for them to download as and when they wish.


Sam Instone: “It’s very easy to use.”

“The secure IFA Systems’ pages have been branded to look like our main site and with a high-level security certificate our clients feel confident in the confidentiality of their data.”

Our Client Information Centre is an upgrade of our earlier Client Login system, and was developed to help IFAs and Financial Planners meet the latest requirements of the FSA as regards security when transmitting personal and financial details. The module can be added to any website and is coloured to match the main site to reinforce the branding.

It contains links to general and personal client documents, planned reviews, adviser details, client bulletins and pre-populated contact forms (which are stored for AES to view at any time), along with links to the secure messaging system.

One of the new features is the re-working of the sections on a client’s factfind details and on their finances. This latter link displays the results of income, expenditure, assets, liabilities and so on in graphical format which changes as you amend data to show the breakdown apportionment. There is also a screen to enable a new client to add their existing pension details, to aid communication with their adviser. The adviser is notified when the client makes any changes, but has to log in to view them, along with an audit trail of all changes made.

Users of 1st-Exchange’s Adviser Office or of Prestwood can also add the Portfolio Adviser system to this module for the portfolio reporting. Through this the client is shown a summary broken down by type of policy, to which they can also add their own legacy details or special interest valuations (for example, value of a classic car collection) to give a picture of their worth. In addition, the adviser is shown reports on sector analysis, asset allocation and investment risk for that client, along with a valuation history.

Contact: Diana Baker, Managing Director, IFA Systems
Tel: 01453 521855; email: diana@ifa-systems.co.uk
www.ifa-systems.co.uk