

# How IFA Systems can help you transform the way you do business with clients on the web

**M**any Financial Planners have websites, large or small. Their clients or enquirers have come to expect one but how many of these sites truly work for their owners?

One site which does is run by Interface Financial Planning, a small firm based in Birmingham. Their website was designed with client service in mind, with the aim of providing a regular service and information flow to clients.

Alan Moran, the principal, says: "While 'static' information is important the limitations of a 'brochure' site were immediately recognised. Our view was that we needed our site to be dynamic, providing updated and relevant information for clients.

"This has been achieved successfully in an uncluttered way and a sense of 'space' has been retained. The site has evolved continuously and new services have been added. In addition to the client interaction facilities there is a comprehensive range of information within the public area of the site, some of it interactive, and much of which is provided and maintained by IFA Systems, meaning we don't have to worry about updating it."

## Interface services to clients include:

- **Portfolio Reporting:** clients can log in and view their portfolio of investments and insurances at any time of day or night, with automatic daily updates on unit prices. Their portfolio can be immediately analysed in terms of investment risk, sector analysis, asset allocation, and risk profile, displayed in easy-to-view graphs. Each individual investment can be 'drilled-down' so that clients can view their exposure to each fund. Our plans are to enable clients to drill-down further so that they can view individual fund reports. If they wish they can save a 'snapshot' of their portfolio value as an historical record.
- **Secure Document Storage:** our main means of document delivery to clients is via the secure area of our website. Documents are uploaded and clients receive a message asking them to login and view/retrieve



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the document, available to them 24/7 from any location. Many clients use our website as a source for reference for their documentation.

- **Secure Messaging:** our Secure Messaging facility is also well used. This provides a secure means of exchanging information and is a two-way process where clients both send and receive information. As soon as a message is posted an e-mail is sent to the intended recipient so that they are able to login and receive information without any issues about confidentiality.
- **Regular Updates from the website to registered clients:** this includes our quarterly newsletter, our monthly Factsheets, our Bulletins, and other ad-hoc broadcasts.
- **Review Reminders:** clients are automatically reminded about their review meetings via a review system and are given a link back to the website where they check and update their basic details. When clients update information online we receive notification and can update our back-office system prior to a review.

## Advice from IFA Systems:

We set up Alan's site based on one of our Financial Planner templates, which we customised as he wanted. This gave a quick and easy route to setting up a quite complex website without it costing a fortune.

The site is managed through our own content management system, Website Manager, through which Alan can update his text, staff details, news items, and where he views details of and communicates with registered clients. He also uses Website Manager to upload client portfolio summaries from Adviser Office to the website. All his client details, messages and documents are stored on our secure

server, avoiding the need to email or post anything of a personal or sensitive nature. Secure messaging does not require any special software.

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