

## ***IFA SYSTEMS' NEW PRODUCT ENABLES AN IFA'S CLIENTS TO GET INSTANTLY UPDATED VALUATIONS***

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IFA Systems have this month launched a service which enables an IFA's clients to log in through their website and request valuations for their portfolio direct from participating product providers. The new service, called Portfolio Updater, is available as an addition to the Portfolio Adviser product, which has also been revised and improved. Initially Portfolio Updater will be linked to Fidelity FundsNetwork™ and Selestia, with plans to link to as many Product Providers as possible to offer a complete service

Gary Baker, founder and Technical Director of IFA Systems, says "The aim of this service is to offer to any IFA, no matter what their back office system, the ability to let their clients get updated valuations of their entire portfolio without the IFA needing to do any work."

"Our existing Portfolio Adviser system enables an IFA to upload a snapshot of his clients' portfolios from Adviser Office, Plum and Prestwood to his website, for clients to log in and view securely. The new Portfolio Updater uses the same format for reporting valuations, but does not require the IFA to use any particular back office system."

The system now allows the client to store histories of up to 10 valuations, provide separate logins for client and partner, request a change of password, add their own policies outside the IFA's remit, and show the latest price date for each fund. Prices can be updated automatically overnight using Finex's price feed. There is additionally an option to link through to Finex's Fund Factsheets for comprehensive information on each fund within each policy.

"Data can be requested from the participating Product Providers and downloaded direct into the website, so the IFA doesn't even have to enter a client's details to get them set up", reports Gary Baker. "The system allocates a unique username and password for each client which the IFA can then issue to that client to log in with. The client and the IFA both have the option of requesting updates to the portfolio as and when they like. We believe the new features offer a very comprehensive and easy-to-use service for IFA and client alike."

**Rob Fisher, Head of Sales & Marketing at, FundsNetwork said:** “We are delighted to be one of the first platforms to link to this innovative initiative from IFA Systems. The ability to deliver this enhanced service offers benefits all round. It enables clients to get the best out of their adviser – empowering clients to request their own valuations directly from providers means they can keep a more regular, closer eye on their portfolio. Plus, the time that this frees up for the adviser can be better spent on tasks like reviewing a client’s investment goals and asset allocation.”

**Paul Miles, Strategic Development & Divisional Sales Manager at Selestia, said,** "Client access is something that more and more IFAs ask us for, so linking in this way with IFA Systems is an ideal solution. Selestia have spent a lot of time recently making sure that they integrate with all the back office suppliers and forming a link with someone like IFA Systems to allow client access was the next natural step."

“We’re really excited about this service”, says Diana Baker, MD of IFA Systems, “because it makes on-line portfolio reporting easily available for any IFA to offer their clients, and we don’t think anyone else is offering them this facility. We can supply the modules, along with our Client Login facility, for addition to any website, or we can supply them as part of a whole website package.”

Further details and a demo can be viewed through [www.portfolio-adviser.co.uk](http://www.portfolio-adviser.co.uk) and [www.portfolio-updater.co.uk](http://www.portfolio-updater.co.uk) or by calling IFA Systems on 01453 521855, or e-mail on [info@ifa-systems.co.uk](mailto:info@ifa-systems.co.uk).

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## Notes to Editors:

# About IFA Systems Ltd

*IFA Systems Ltd designs and maintains websites solely for IFAs. The websites can be either bespoke or templated, with the templated solutions offering a range of flexible designs, giving a very professional and comprehensive website at very reasonable cost. The firm also offers a wide range of additional features which can be added to an IFA's website, many of which are programmed in-house. Their sites can offer on-line trading facilities if wanted, but their approach is that a website should primarily be geared to helping IFAs provide added-value service to their existing clients.*

<b><u>IFA Introsite</u></b> packages:	setup cost from £195 + VAT, monthly cost £35 + VAT
<b><u>IFA Infosite</u></b> packages:	setup cost from £325 + VAT, monthly cost £85 + VAT:
<b><u>Fee-based Website</u></b> packages:	setup cost from £450 + VAT, monthly cost £55 + VAT
<b><u>OnLine Services</u></b> package:	setup cost £200 + VAT
<b><u>Mortgage Adviser</u></b> packages	setup cost from £225 + VAT, monthly cost from £50 + VAT
Portfolio Adviser package	setup cost from £495 + VAT, monthly cost from £75 + VAT
Portfolio Updater package (additional to Portfolio Adviser)	setup cost from £225 + VAT, monthly cost from £25 + VAT (special monthly price until end July 2007)
<b><u>Additional features:</u></b>	see prices quoted on Website Addons page on <a href="http://www.ifa-systems.co.uk/addons/">http://www.ifa-systems.co.uk/addons/</a>

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