



# PLUTOSOFT GUIDE

*Helping financial advisers reach new heights*



ISO 27001 CERTIFIED



# HELLO!

Plutosoft is the all-in-one software solution for financial practices. Say goodbye to outdated legacy systems. Plutosoft offers a robust CRM and workflow tool, an integrated client portal, extensive data feeds, and interactive modelling — all designed to boost efficiency. Enhance client interactions, reduce administrative burdens and launch practice efficiency with Plutosoft.

**From Fact Find to Advice Delivery, Plutosoft does it all.**

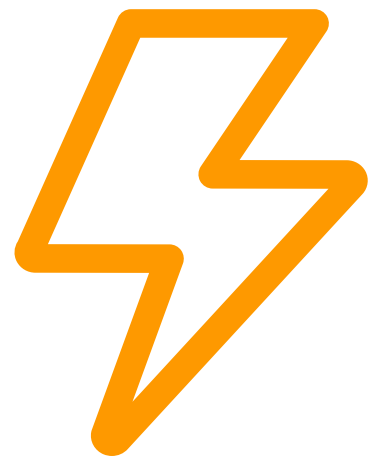


# Why Plutosoft

ON-BOARD NEW CLIENTS

**50%**

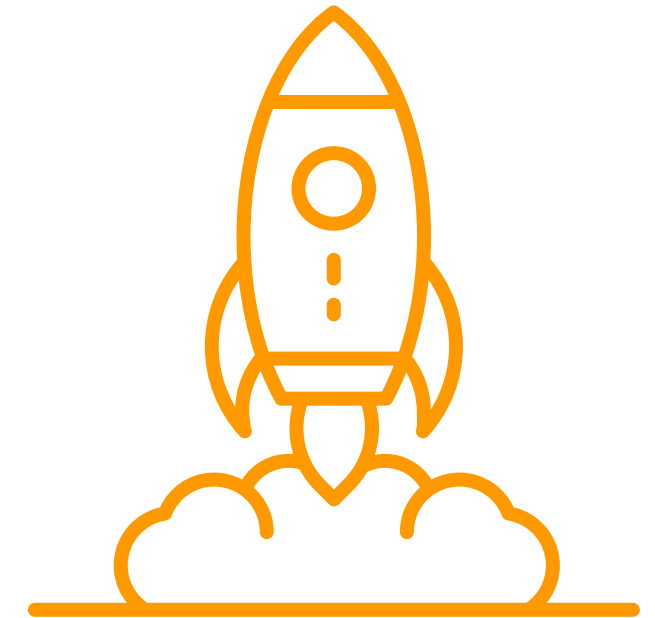
FASTER



PRODUCE ADVICE IN A

**1/4** OF THE TIME

COMPARED  
TO LEGACY SYSTEMS



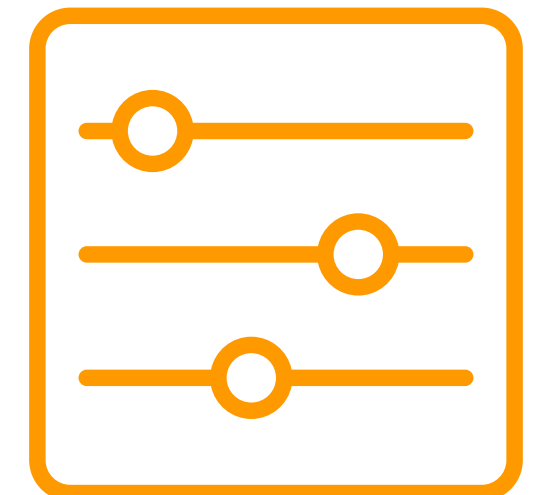
**1**

POINT OF DATA  
ENTRY. STOP  
RE-ENTERING  
& DUPLICATING  
DATA



**EFFORTLESSLY**

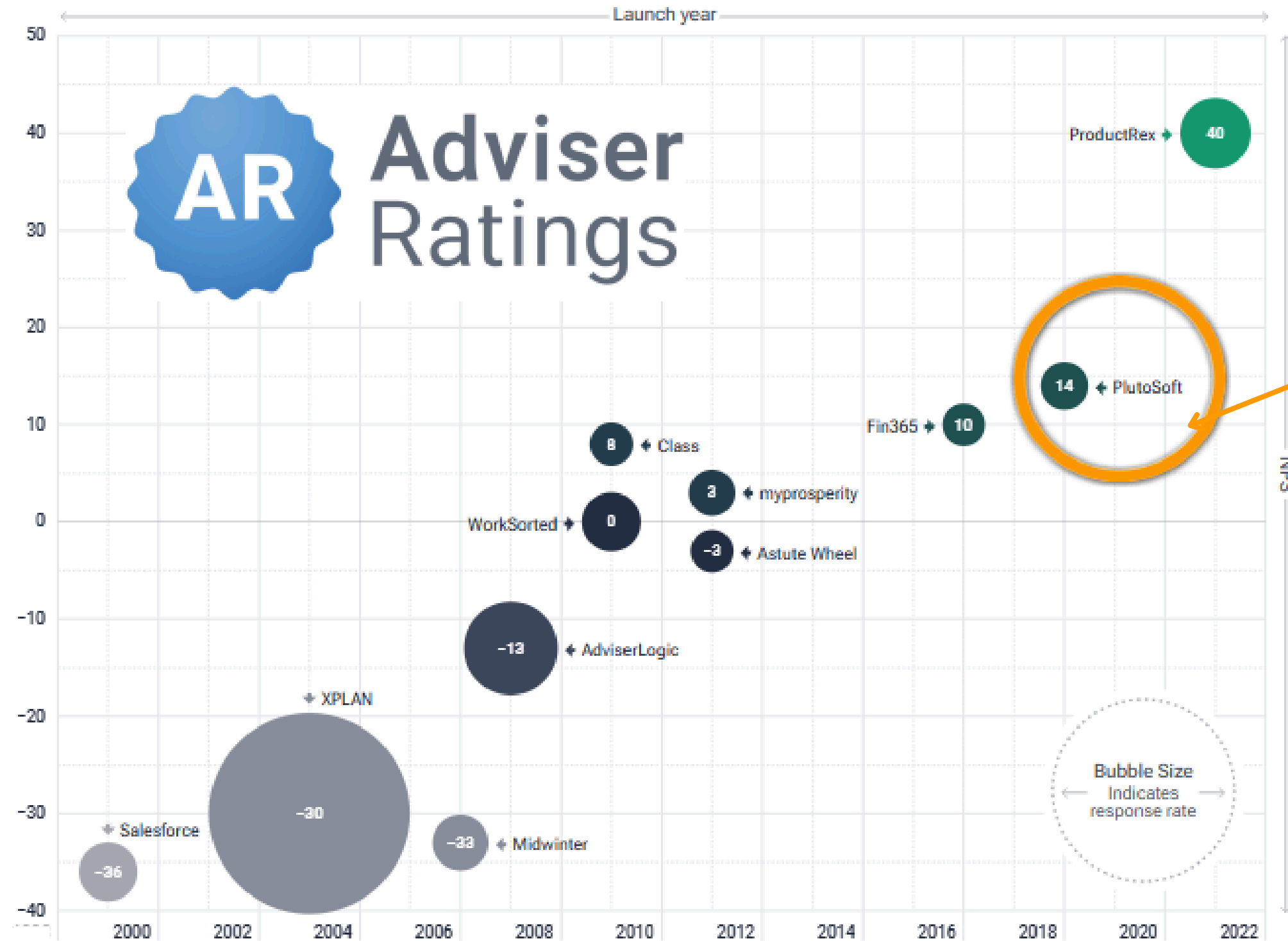
BUILD, CUSTOMISE &  
MANAGE YOUR OWN  
TEMPLATES &  
WORKFLOW PROCESSES



# NPS Score

## Software NPS

Source: ARdata. Note: The publisher of this publication, Adviser Ratings Pty Ltd, is a 100% owner of ProductRex (effective May 2023).  
The adviser reviews have been independently assessed in terms of data collection, veracity of results and the application of ratings

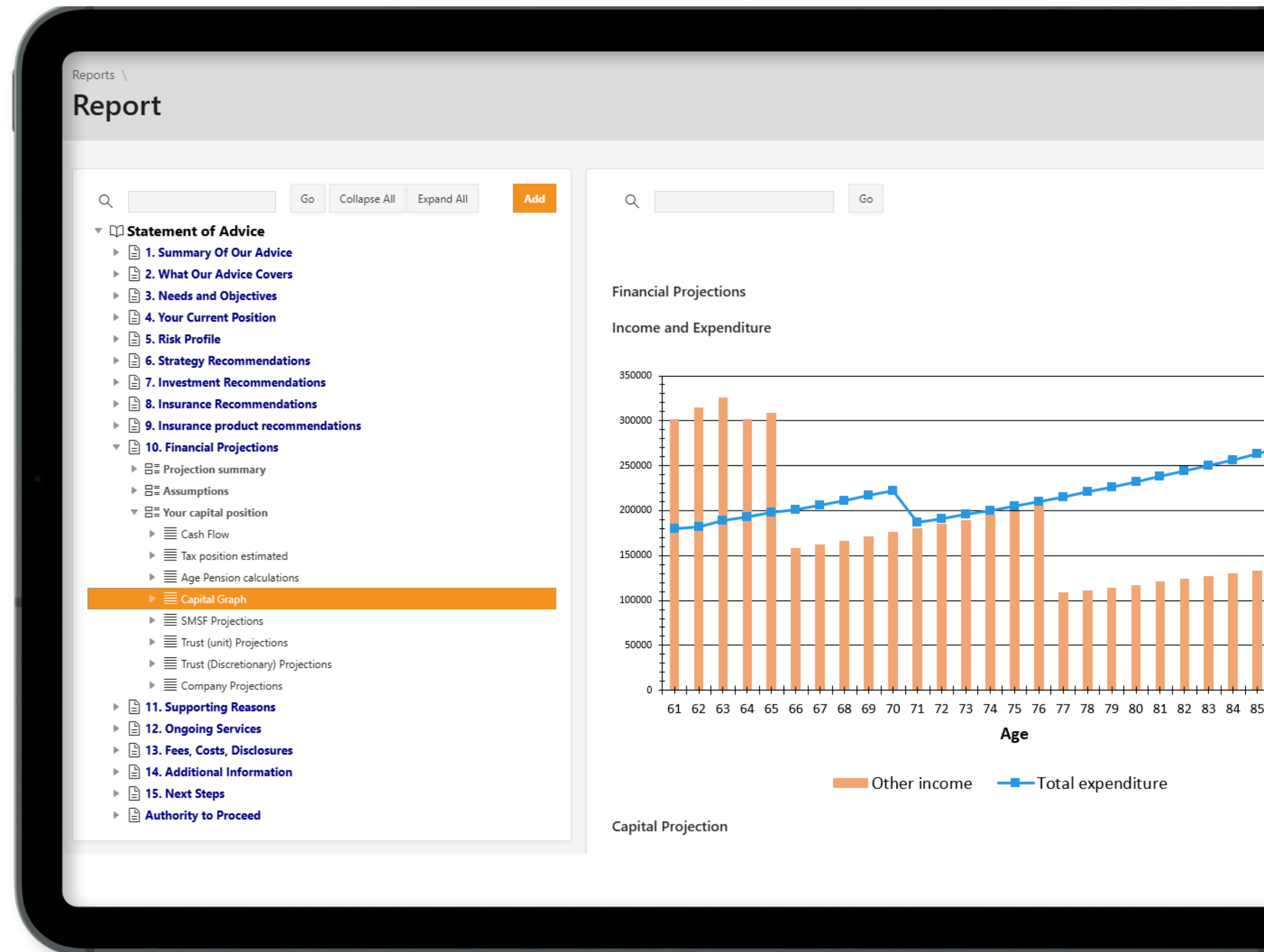


PlutoSoft achieved the highest NPS in the CRM category of the Adviser Ratings 2024 report, strongly leading many of the legacy incumbents! (the chart shows NPS across all categories).

# OUR PRODUCT

## AUTOMATE ADVICE DOCUMENTS

Produce advice documents in minutes not days with ease and precision. Its intuitive design builds the advice as you progress. Easily customise reports to conform with your requirements - we also offer an extensive template library.



# OUR PRODUCT

## INTERACTIVE MODELLING

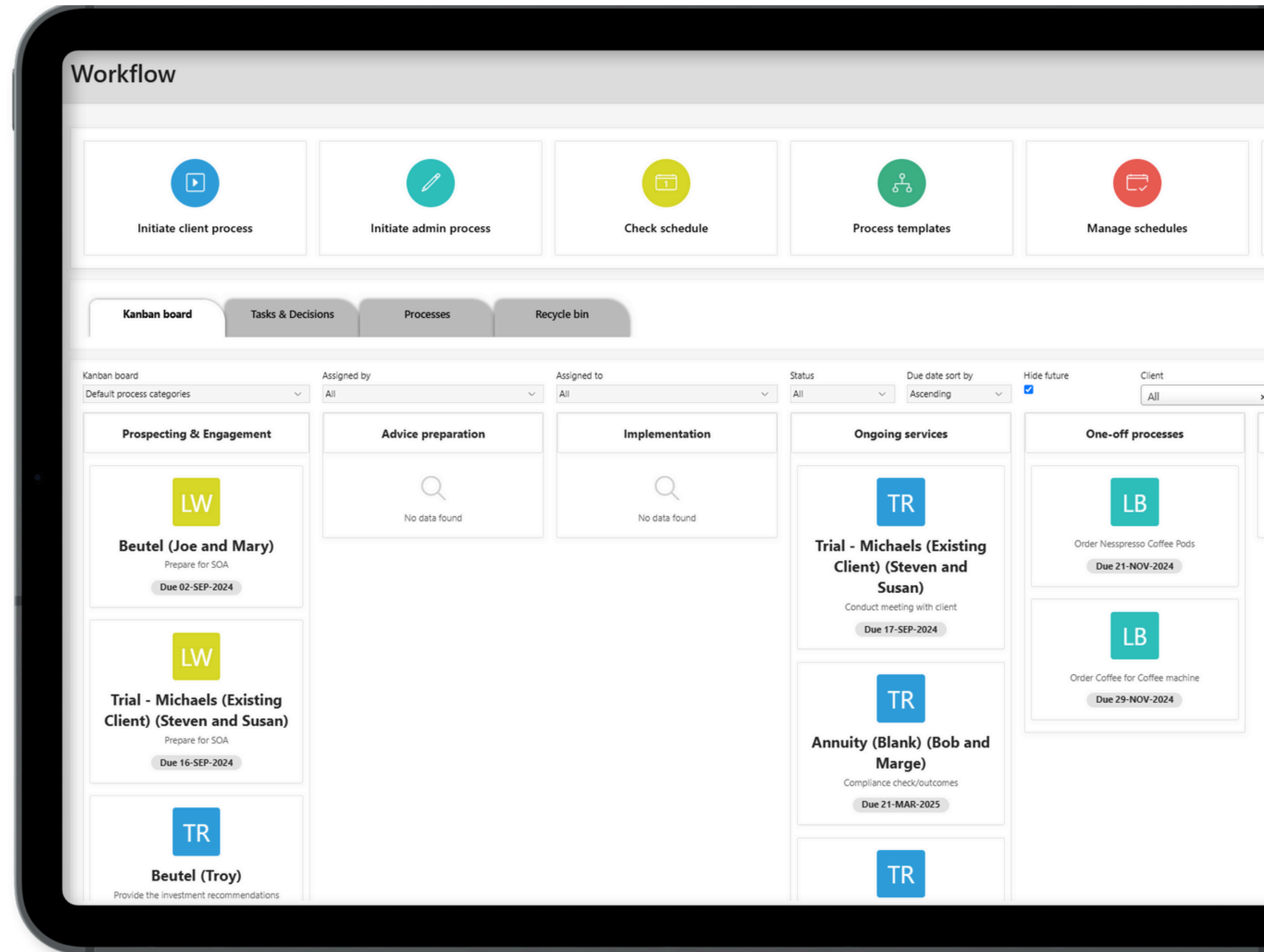
You can conduct cash flow modelling directly in front of your clients with our smart, comprehensive and easy to use modelling tool. Create multiple scenarios for clients to compare different strategies.



## OUR PRODUCT

# WORKFLOW & COMPLIANCE

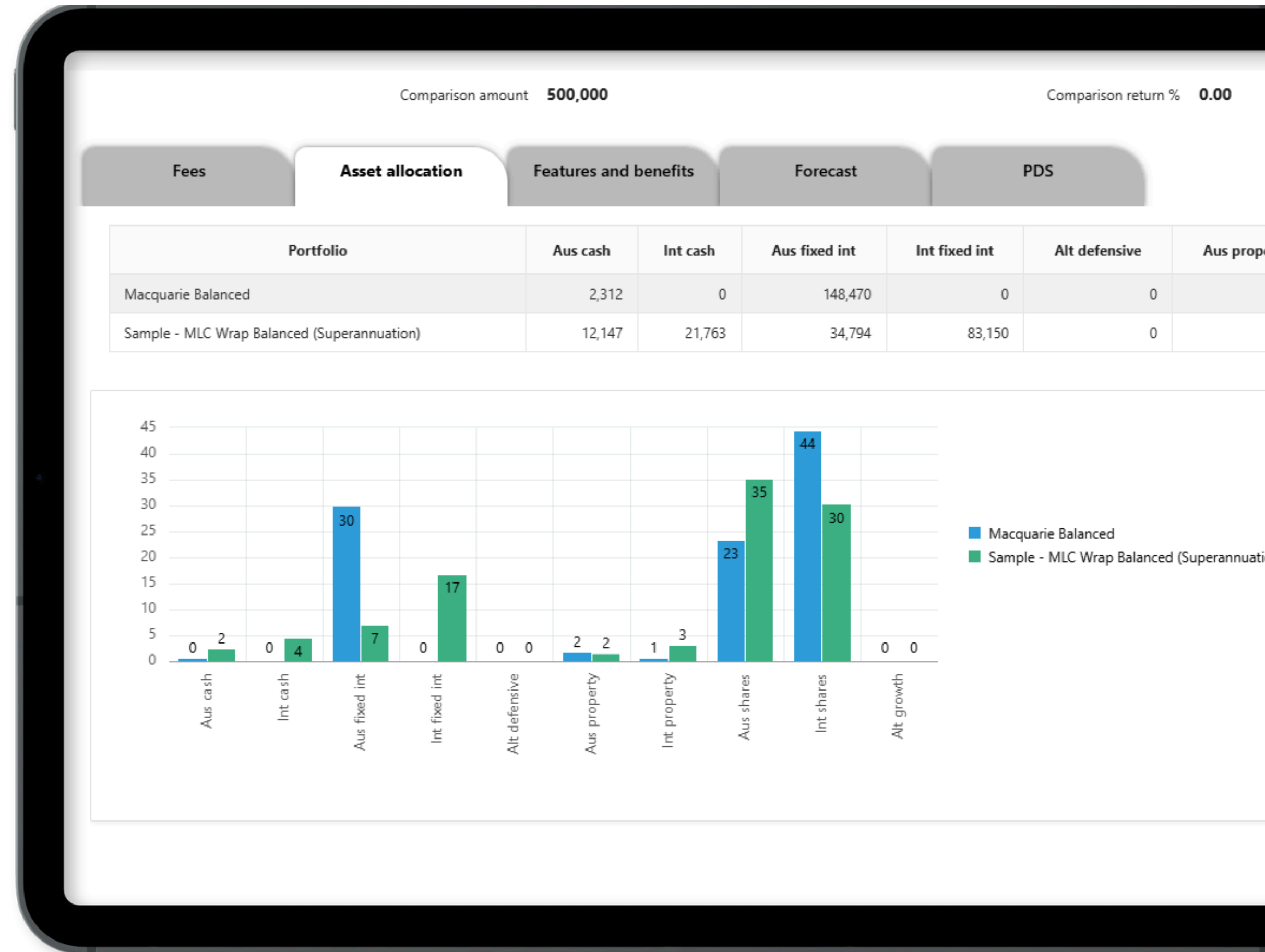
Easily build comprehensive workflows with notifications. Get an instant overview of every task and decision across your firm. The software automates and tracks compliance deadlines. Choose a regular workflow view or kanban board.



## OUR PRODUCT

# PRODUCT RESEARCH & COMPARISONS

Compare insurance products, superannuation funds and investment platforms right within the system. We partner with the most respected research companies in the industry.

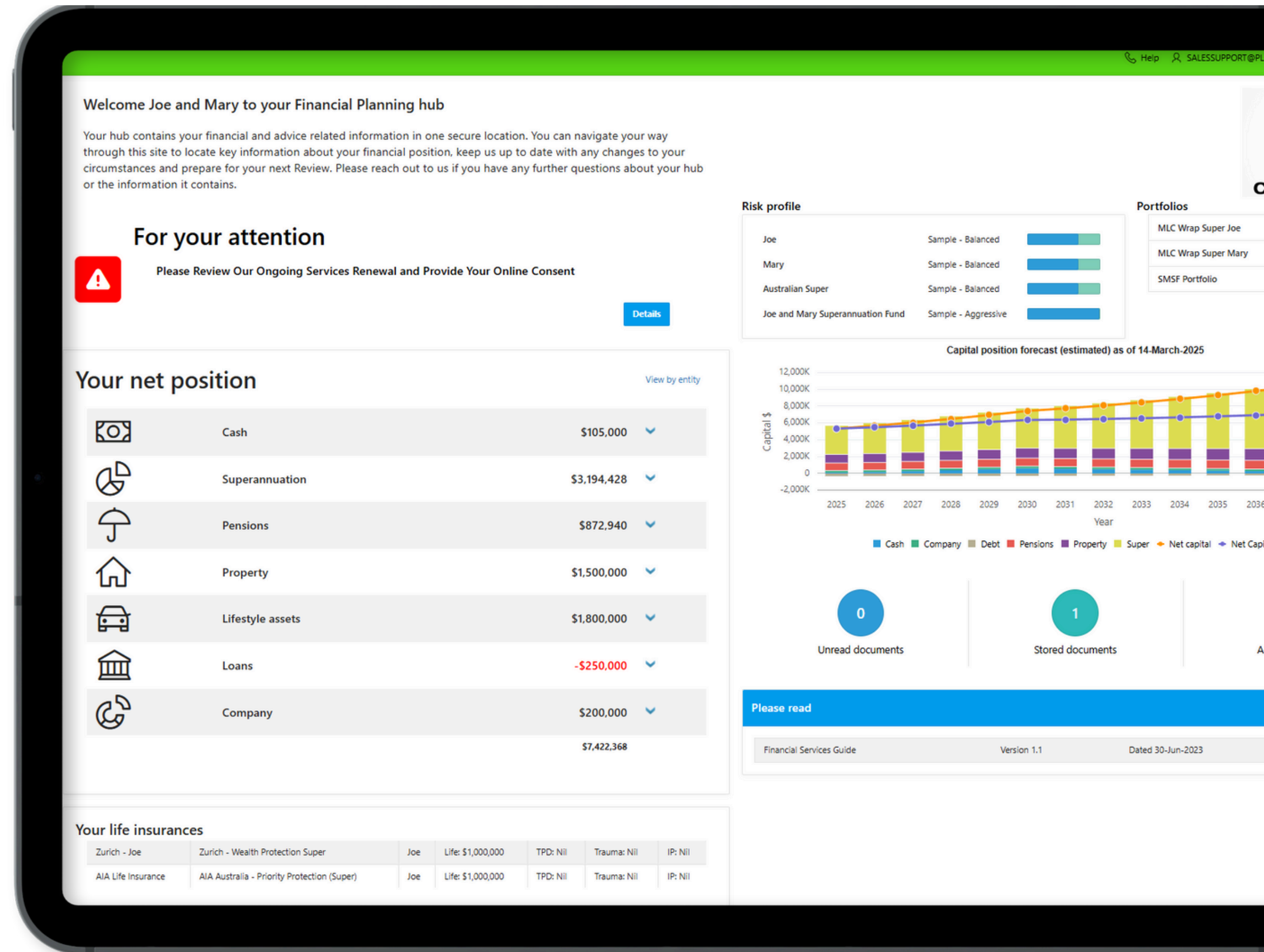




# OUR PRODUCT

## CLIENT PORTAL

Enable clients to add fact-find data prior to meetings - syncing directly with your adviser hub. Clients can view assets, liabilities, and financial projections, while you can share scenarios after meetings. The portal is customisable with your practice's branding. We also offer digital document signing.



# Integrations and Partnerships

 Annature

 Asgard

 AUSIEX

 belldirect >

 BT

 Colonial  
First State

 generation  
life

 HUB<sup>24</sup>

 IOOF

 MACQUARIE

 MLC

 MORNINGSTAR®

 netwealth

 North

 Omnium

 praemium

 REVEX

 SENTINEL  
FINANCIAL GROUP

PlutoSoft has built an impressive range of integrations with many of the major investment platforms in the industry. We partner with only the most reputable and respected research companies. We also work with many business management systems, enabling practices to efficiently conduct their day-to-day business through our platform.

*Get in touch for our full data feed list.*



**CPB Financial Services**  
Relationships | Solutions | Support

“Plutosoft has streamlined our processes. Ongoing advice **document preparation time is 30% quicker per client.**”

**Roskow**  
Independent Advisory

“**Interactive modelling** has been the real difference to our business – it is such a powerful exercise when done with our clients.”



**prosperity**  
wealth advisers

“The implementation exceeded expectations. The team were very proactive throughout the onboarding process and the migration of data from our previous CRM was seamless.”



“Plutosoft has **revolutionised our business!** It is the total solution we had been looking for.”

**ENRIZEN**ONE

“We are definitely **getting our advice out a lot quicker**, less editing, which is huge because there’s a time saving there.”



kingston private wealth

“Plutosoft provides us with key functionality we require in our business, enabling the **efficient production of SOA’s, ROA’s** and all fee reporting requirements.”

# MAKE THE SWITCH TODAY!

**SPEAK TO TROY BEUTEL**

 **0417 077 309**

 **<https://www.plutosoft.com.au>**



**PLUTOSOFT** 