

AR Value Proposition to Centrepoint Alliance

Product

- FEATURES**
- ✓ XPLAN & Worksorted Integration
 - ✓ Easy to use Digital Fact Find
 - ✓ Two Factor Authentication Client Portal
 - ✓ Custom Task Management
 - ✓ Request & Sharing of Documents

Benefits

- Efficiency using integration
- Improve data security
- Simple application for Support staff, Adviser & their clients

EXPERIENCE

Over 95% of clients embrace the client portal, the XPLAN integration is fantastic and love having a safe & easy place to interact with my clients

Adviser

WANTS

- Easy to use application for both Adviser & Client
- Secure data protection
- Affordable option for all advisers to purchase

NEEDS

- Licensee technology support & guidance
- Cost to Benefit ratio
- Data security processes & policies

FEARS

- Loss of productivity
- Loss of client/s due to lack of adoption

ADVICE REVOLUTION - CPAL PRICING

★ PLUS

First 3 months 50% off

saving of \$148.50

(RRP \$99 p/mth per adviser + GST
for new users only)

👑 PRO

\$220 p/mth per adviser + GST
(RRP \$249 p/mth per adviser +GST)

**Please note for existing PRO subscriptions, this
bulk discount is retrospective so you will receive a
refund of the difference*

What's Coming

Digital Signatures | Review Questionnaire | Review Mini Fact Find |

Client Portal Completion & Task Reminders | Sharing Client Goals via Client

Portal | Allocating Custom Forms to Clients via Client Portal