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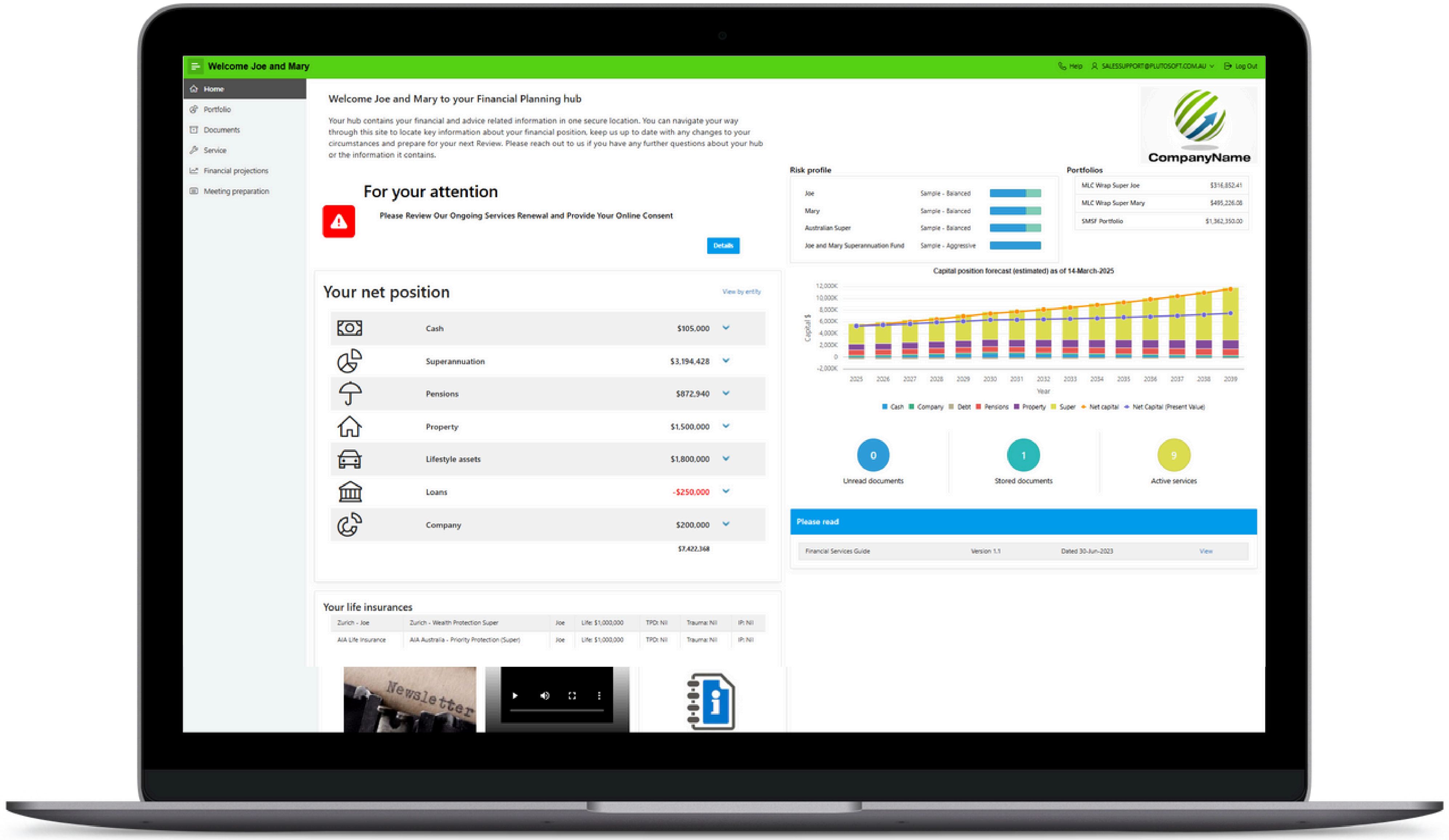
# IMPLEMENTATION GUIDE

ISO 27001 CERTIFIED

BOOK DEMO

# Plutosoft Solution




### Interactive modelling

Advisers can conduct cash flow modelling directly in front of their clients with our smart, comprehensive and easy to use modelling tool.

### Automate advice documents

Advisers can produce advice documents with ease and precision. Plutosoft produces advice documents in a fraction of the time compared to other software programs. Reports can be customised to conform with your requirements (we also have an extensive template library available).

### Workflow and compliance

Advisers get an instant overview of every task and decision across their firm. The software automates and tracks compliance deadlines.

### Product research and comparisons

Easily compare different insurance products, superannuation funds and investment platforms. We partner with the most respected research companies in the industry.

### Client portal

Clients have access to their own portal through which they can update their information and book appointments online with their Adviser.

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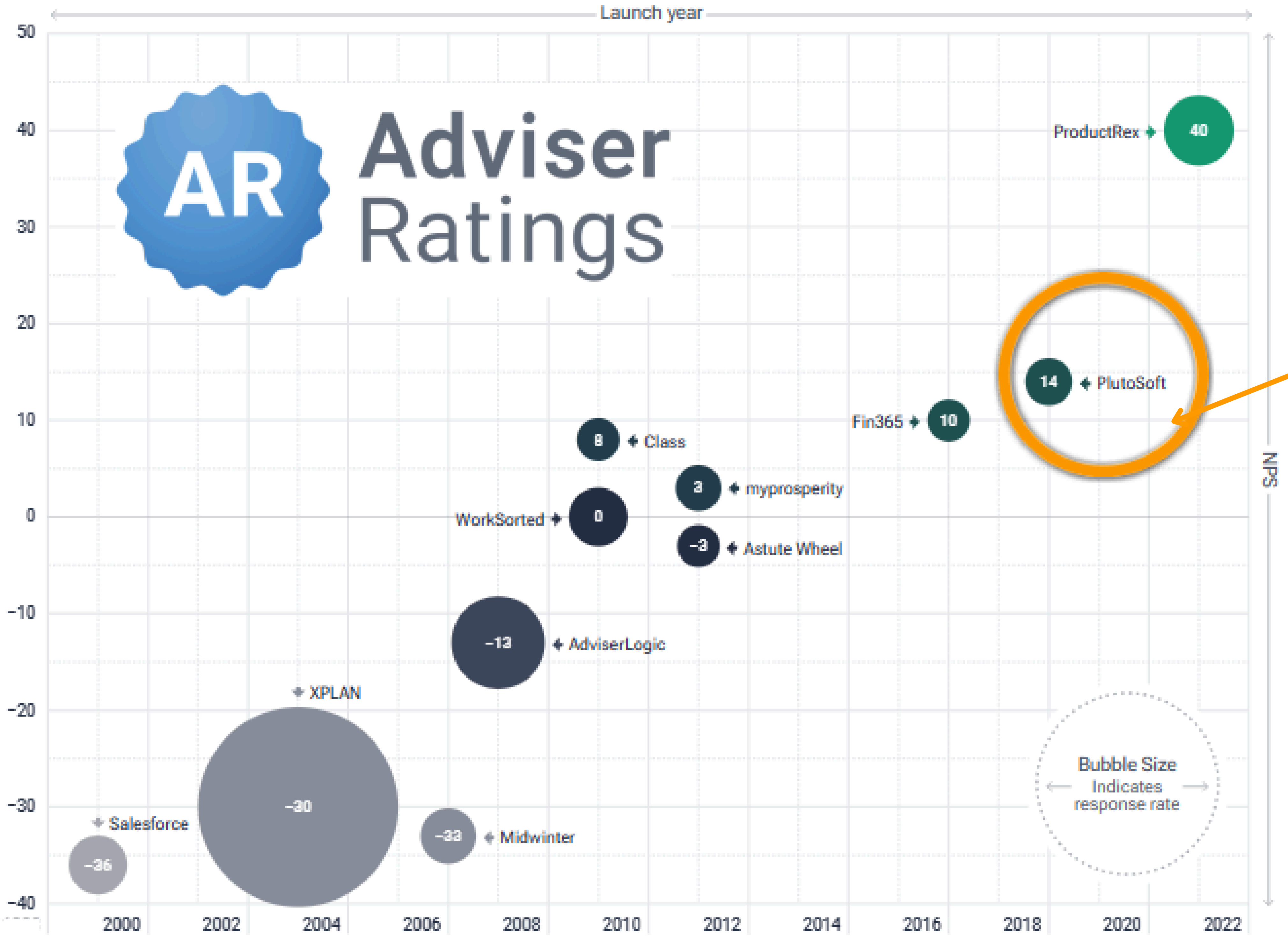
# NPS Score

## 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).

**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

"Plutosoft sits in the perfect sweet spot between being an established, mature, **proven system and a nimble adaptable solution."**

**RFS**
REGIONAL FINANCIAL SOLUTIONS

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

**ENRIZENONE**

"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."

# End-to-End Advice System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# Integrations and Partnerships

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.*

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# One System. Three Powerful Modules

## Adviser Hub

Practice management software to help you grow faster, manage clients better and produce advice documents quicker.

### Popular Features

- Fast advice generation
- Interactive modelling
- Product research
- Workflow, practice management and CRM

## Client Hub

Firm branded portal to help your clients see their financial projections in one place.

### Popular Features

- Fact Find & Risk Profile Questionnaire
- Financial projections
- Live portfolio view
- Document vault, service requests & digital document signing

## Licensee Hub

A central portal to help you manage your dealer group and compliance.

### Popular Features

- Revenue integration
- Compliance tracking and reporting
- Practice wide configuration
- Template management and cloning

# Implementation Plan

## 01

### Alignment Meeting

- Outline our approach
- Define key users
- Meet your Customer Success Manager

## 02

### Default Instance

- Activate user accounts
- Standard reports and workflow templates
- Wiki self-help instructions

## 03

### Configure

- Data feeds
- Data Migration
- Custom Reports
- Custom work flow

## 04

### Training Plan

- Wiki online
- Regular contact points with Customer Success Manager
- Option for consulting services

## 05

### Support

- Ongoing support and maintenance provided

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# Adviser Hub

| FEATURES | ACCELERATE | PROFESSIONAL |
|---|---|---|
| **Access and pricing** | | |
| License Fee | Talk to sales | Talk to sales |
| Adviser Users | Unlimited | Unlimited |
| Support Users | Not included | Up to 3 per Adviser User at no charge |
| Active Client Groups | 45 (per Adviser user) | Unlimited |
| **Advice** | | |
| Fact Find & Fact Find Reporting | Yes | Yes |
| Strategy Modelling | Yes | Yes |
| Investment Product Research [Platform features, Platform Fees, Managed Fund/Investment Option Fees, Asset Allocation] | Yes | Yes |
| Report Library | Full Suite | Full suite |
| Build your own report templates | Yes | Yes |
| Advice production | Yes | Yes |
| Platform Data Feeds | No | Yes [maximum of 4 providers] |

*12 month term payable monthly

# Adviser Hub

| FEATURES (CONT'D) | ACCELERATE | PROFESSIONAL |
|---|---|---|
| **CRM** | | |
| Email archive | Yes | Yes |
| Workflow | Yes | Yes |
| Revex integration (if applicable) | No | Yes |
| Revenue import and mapping | Yes | Yes |
| Practice management reports | Yes | Yes |
| Bulk activities (bulk emailing, bulk reporting etc) | No | Yes |
| **Client portal** | | |
| Client Hub standard | Yes | Yes |
| Client Hub premium | Optional | Optional |
| **Optional add-ons** | | |
| Omnilife risk research licence | Talk to sales | Talk to sales |
| Extra data feed | - | |
| Add additional Support User | | |
| 'The Pulse' business analytics | Talk to sales | Talk to sales |

*12 month term payable monthly

# Adviser Hub

| ON-BOARDING AND IMPLEMENTATION | ACCELERATE | PROFESSIONAL |
|---|---|---|
| Implementation Fee (one-off) | Talk to sales | Talk to sales |
| Account set-up and access | Yes | Yes |
| Report configuration (logo, AFSL and corporate branding) | Yes | Yes |
| Data feed configuration | Not applicable | Yes |
| Training materials (online wiki) | Yes | Yes |
| Priority support during on-boarding phase | Yes | Yes |
| Access to Client Success Manager | Yes | Yes |
| **Optional add-ons** | | |
| SQL data transfer from existing software [client contact details, file notes, documents uploaded, compliance records, selected fact find items] | Talk to sales | Talk to sales |
| Ad-hoc consulting | Subject to quote | Subject to quote |

# Client Hub

| FEATURES | STANDARD | PLATINUM |
|---|---|---|
| **Access and pricing** | | |
| Licence Fee | Free with Adviser Hub | Talk to sales |
| **Meeting preparation** | | |
| Online Fact Find and Risk Profile Questionnaire | Standard | Yes |
| Online appointment booking | Yes | Yes |
| Ability to customise questions in Online Fact Find | Yes | Yes |
| Ability to customise Risk Profile Questionnaire | Yes | Yes |
| Ability to customise selected content for different client segments [e.g. new prospect or existing client] | Yes | Yes |
| **Branding and Style** | Neutral | Your branding |
| **Home page** | | |
| Home page with dashboards | No | Yes |
| Add newsletter and video content | No | Yes |
| **Additional functionality** | | |
| Portfolio View | No | Yes |
| Document Vault | No | Yes |
| Service requests | No | Yes |

# Summary of Outcomes

- Produce advice documents and reports with ease and precision
- One system to manage your firm
- Amaze your clients
- Unlock huge productivity benefits
- All data securely stored on an Oracle data centre in Australia
- Powered by Oracle, one of the world’s largest software companies
- ISO 27001 certified

# MAKE THE SWITCH TODAY!

## SPEAK TO TROY BEUTEL

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https://www.plutosoft.com.au

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