

ADVISERNETGAIN TAKES ONGOING ADVICE TO THE NEXT LEVEL

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AdviserNETgain, an online financial planning solution that integrates advisers' front and back office, has released its new bulk review feature enabling the production of an unlimited number of review advice documents in one process.

Darelle Jenkins, National Manager AdviserNETgain, said the bulk review feature creates a scalable review model for advisers that saves time and provides the flexibility to review clients according to an individual review schedule.

"We set out to provide an intuitive online solution for advisers that aligns with changes in adviser's needs and integrates seamlessly with the way they work," Ms Jenkins said.

"The bulk review feature means advisers can update clients as a result of APL changes and respond to 'sell orders' efficiently by producing review advice documents in bulk advising clients to switch to an alternative investment.

"It also provides a consistent approach to modifying existing advice reducing risk and making it easier to keep all clients with the same risk profile in a consistent portfolio of investments."

Ms Jenkins said the bulk review features will ultimately help advisers spend less time on data entry and compiling reports.

"This new functionality that allows advisers to transact in bulk, supports scalable delivery of ongoing advice and provides seamless integration with Asgard meaning no double data entry allowing advisers to spend more time with their clients," she said.

"AdviserNETgain is all about one easy-to-use system with single data entry that integrates front office processes such as fact find data, SoA generation and workflow tasks with back office tasks including product transactions and administration."

Ms Jenkins added there was also an opportunity for branding the advice documents when using AdviserNETgain's Style Sheet capability.

About AdviserNETgain

AdviserNETgain ranked highest in satisfaction amongst all full service financial planning applications in the 2009 Investment Trends Planner Functionality Report. AdviserNETgain is an online solution that enables advisers to manage their workflow in order to deliver quality advice and service to their clients. By working the way advisers work, AdviserNETgain assists advisers to provide quality advice and run more efficient and profitable businesses. The AdviserNETgain team works closely with each adviser practice to understand their unique situation and preferred way of working, before assisting the practice to integrate the solution into their business model, transition to the new system and provide ongoing support and training to users.

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