

Build your own  
tech?

WHY....

# What will we cover?



What was my problem?



What did we think was the easy fix?



iFactFind

What became our solution - iFactFind



Brief Demo



Where to from here?

# What was my problem?



No standard data collection system



Paper-based collection hasn't really changed in 25 years



Almost always returned semi-completed



No conditionality of questions



No adviser vision of level of completeness



No evidence of who completed what information



No ability to easily transfer data if adviser or client moves on



Data was static by definition

# Netwealth 2019 Adviser Tech Report

iFactFind  
focus



## Process and people are at the heart of change

Advisers expect new technologies to fundamentally alter specific processes and activities in the next five years. Process (e.g. the preparation of the initial financial plan/advice, including SOA creation at 46.89%) and people (e.g. client communications and engagement at 44.92%) are regarded as the areas which will be most significantly impacted by AdviceTech.

Execution of investments is another key process advisers regard as open to tech change (40.00%).

### Which part of the advice process will be impacted most in the next five years by AdviceTech?



What did we think was the easy fix?



**Editable PDF, Cognito Forms or a simple web-based form**



**Very limited functionality, didn't resolve double handling, didn't resolve poor completion, no audit logs and no true database**



**Nothing provided the level of detail I wanted in the client data capture or gave me the ability to follow client progress**

What became  
our solution -  
iFactFind



# iFactFind



Setting the new standard in client data  
collection and management



Intelligent, interactive, intuitive and innovative

# Spot the difference...

**Progress Bar** 100%

- Personal Details 100%
- Children/Other Dependents 100%
- Entities 100%
- Employment Details 100%
- Assets 100%
- Liabilities 100%
- Insurances 100%
- Income & Expenses 100%
- Estate Planning 100%
- Risk Tolerance 100%
- Goals 100%
- Documents to Bring 100%

SUBMIT FACTFIND




Wednesday, 6 November, 2019 | 11:59:36 AM

Bill  bill.factfind@gmail.com
 Adviser Dashboard



Personal Details

**iHELP** Personal Details

The basis of this service is to gather detailed information about you. This section will ask the obvious questions to start with (name, date of birth and address) as well as your contact details. We also ask for your **Tax File Number** (optional) for future account opening purposes, but this sensitive information will be *encrypted & stored securely*.

| Client/Partner | Description | Status                               |
|----------------|-------------|--------------------------------------|
| ▶ Client       | Bill Smith  | <span style="color: green;">✔</span> |
| ▶ Partner      | Mary Smith  | <span style="color: green;">✔</span> |

PREVIOUS
NEXT

# What detail *did* we get?

## Personal Use Assets

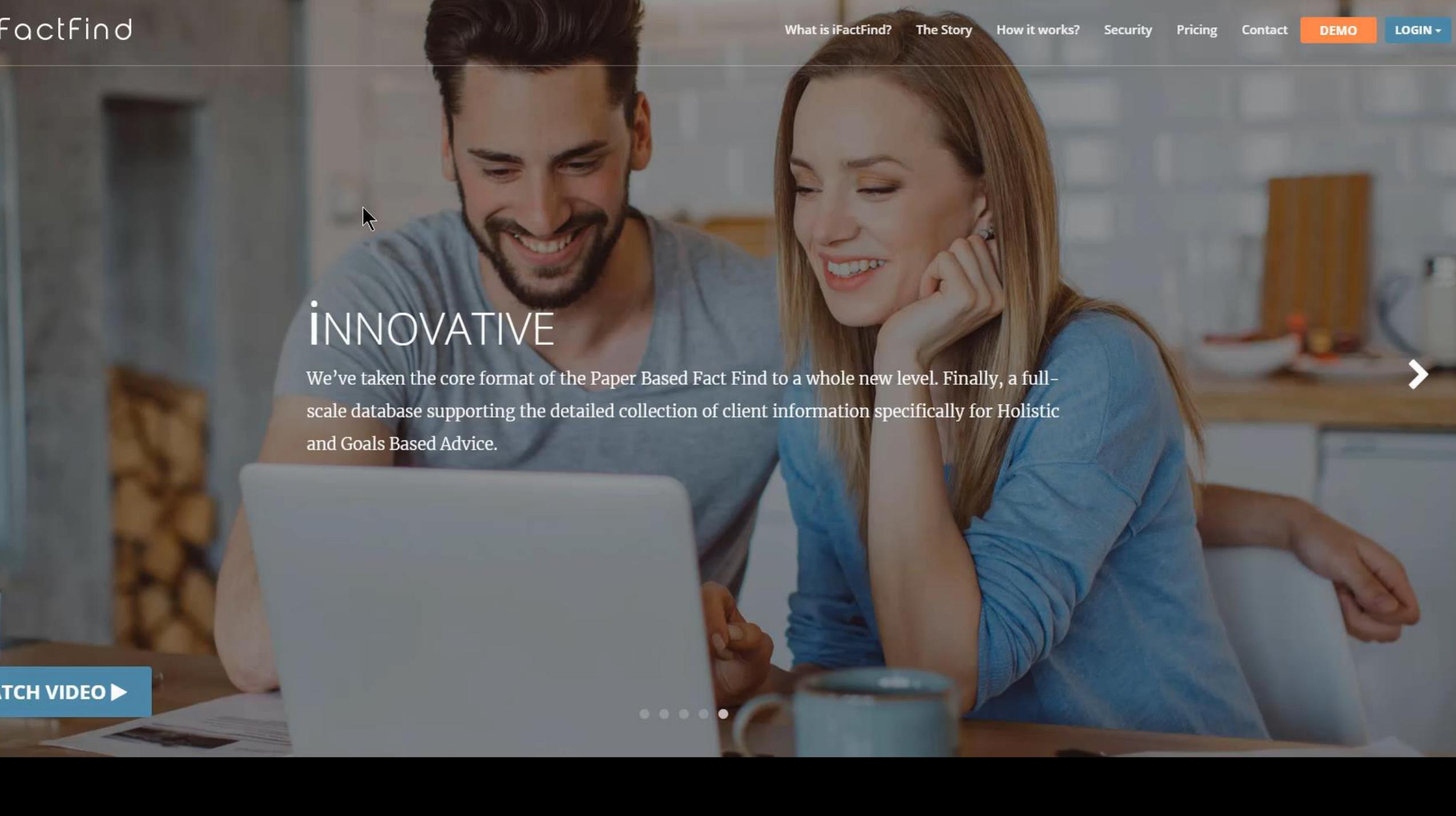
|                           | Client 1 | Client 2 | Joint  | Total |
|---------------------------|----------|----------|--------|-------|
| Home                      |          |          | 800000 |       |
| Contents                  |          |          | 75000  |       |
| Motor Vehicles            | 15000    | 22000    |        |       |
| Caravan/Trailer/Boat      |          |          |        |       |
| Holiday home              |          |          |        |       |
| Collectibles/Art/Antiques |          |          |        |       |
|                           |          |          |        |       |
| <b>Total</b>              |          |          |        |       |

## Estate Planning

|                                 | Client 1 | Client 2 |
|---------------------------------|----------|----------|
| Do you have a current will?     | Yes      | Yes      |
| When was this last updated?     |          |          |
| Do you have a Power of Attorney | Yes      | Yes      |
| Enduring?                       |          |          |
| Financial?                      |          |          |
| Medical?                        |          |          |

## Investment Assets

|                     | Client 1 | Client 2 | Joint | Total |
|---------------------|----------|----------|-------|-------|
| Cash                |          |          | 12000 |       |
| Fixed Bank Deposits |          |          |       |       |
| Debentures/Bonds    |          |          |       |       |
| Direct Shares       | 25000    | 15000    |       |       |
| Direct Property     |          |          |       |       |
| Managed funds       |          |          | 12000 |       |
| Business assets     |          |          |       |       |
| Art & Collectibles  |          |          |       |       |
| Superannuation      | 210000   | 175000   |       |       |
| <b>Total</b>        |          |          |       |       |



# iNNOVATIVE

We've taken the core format of the Paper Based Fact Find to a whole new level. Finally, a full-scale database supporting the detailed collection of client information specifically for Holistic and Goals Based Advice.

[WATCH VIDEO](#)



# Where to from here?



DATAFEEDS AND AUTO  
UPDATING OF DATA



API INTEGRATIONS WITH  
OTHER PROVIDERS



BIG DATA ANALYSIS FOR  
PROFESSIONAL AND  
ACADEMIC PURPOSES



PULSS - DCP™

How can I  
get started?

iFactFind

What is iFactFind? The Story How it works? Security Pricing Contact **DEMO** LOGIN

## Demo

### Select a Day

November 2019 < >

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-----|-----|-----|-----|-----|-----|-----|
|     |     |     |     |     | 1   | 2   |
| 3   | 4   | 5   | 6   | 7   | 8   | 9   |
| 10  | 11  | 12  | 13  | 14  | 15  | 16  |
| 17  | 18  | 19  | 20  | 21  | 22  | 23  |
| 24  | 25  | 26  | 27  | 28  | 29  | 30  |

Sydney, Melbourne Time (4:49pm) ▾

### Book a demo

Before starting a 45 Day Free Trial, we recommend that you complete our 45 Minute Zoom Demo. This will ensure that you will get the most out of your Free Trial.

This will allow us to show you how to navigate the iFactFind process as efficiently as possible.

We understand that every practice has its own method of managing clients and we have worked hard to provide as much flexibility as possible around the On-Boarding process. However, this means that you really need to understand these different options before you start to use iFactfind.

Please book a time here for your 45 minute Zoom demonstration.

**No Thanks!**  
I wish to start my trial now

- Just register for a demo and we will provide a couple of months free
- Constructive feedback welcome
- [www.ifactfind.com.au](http://www.ifactfind.com.au)