



Rocket fuel to ignite your practice

Imagine a world in which software was easy-to-use, made your practice run effortlessly and freed up your time to focus on the things that really matter.

More time with clients, growing your practice and thinking strategically – and less time on compliance and administration.

**Plutosoft is
that software.**

Welcome to a new world of software

Plutosoft is a comprehensive cloud-based financial planning software and practice management program.

Created in a financial planning practice, from the ground up, Plutosoft solves the problems that advice practices face.

Let's face the facts:

- Advisers are less than satisfied with their current CRM and software providers (Source: Money Management);
- Improving profitability, systemising work-flow and maintaining technology are among the greatest challenges that advisers are faced with (Source: Dimensional Advisor Benchmark Survey 2017);
- There is clearly a gap between what advisers require their technology to deliver and what established providers are currently delivering.

The PlutoSoft difference

PlutoSoft is different. It is designed to act and think like an adviser and do what great financial planning software should do. It:

- automates non-value adding functions, such as compliance and administration;
- radically reduces the time and cost of delivering advice and producing advice documents;
- creates a highly systemized working environment;
- maximises the profitability and value of advice practices;
- avoids unnecessary duplication inherent in other software programs; and
- is intuitive, smart and user friendly.

Features



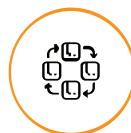
Interactive modelling

Conduct live modelling directly in front of your clients with the smart and easy to use modelling tool. Compare the outcome of following different strategies with graphical simulations.



Automate advice documents

Produce even the most complicated Statement of Advice documents with robo-like ease and precision. Produce your advice documents in minutes, not days.



Task and workflow management

Get an instant overview of every task and decision across your office. Never miss a compliance deadline with automated alerts.



Portfolio reporting

View, manage and track your clients' portfolios in one place. Produce a customised portfolio report at the click of a button.



Client portal

Let your clients' login to their own portal, update their information and book appointments online.

Data security

PlutoSoft data is stored on a relational database in Australia using industry best practice in data security and encryption.

Let PlutoSoft transform your practice and experience the power of great technology:

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