



The Challenge

- Our No. 1 requirement was to reduce the time it takes to produce high quality compliant advice documents
- ONE system to support our business, ensure we are compliant and remove double handling of data
- Simplify our tech stack and reduce monthly outgoing business costs

The Solution

We started our Plutosoft journey in January 2020 and by April we were producing all our advice documents from the platform. The automation of our processes has significantly improved how quickly we can get an advice document in front of a new client, and often it is now the case that a review of a clients position and the advice document are completed in the same day. Implementation was easy and we are able to maintain the system ourselves, removing the need for external support and reducing the time it takes to implement changes – this is a REAL asset!

The Result

With the introduction of Plutosoft we have increased client engagement using the client portal and interactive modelling. The efficiencies gained allows us time to focus on growing the business rather than administration tasks. My staff love it, our clients love it – it has been a real game changer for us.

“ I had been looking for a total end-to-end solution. Plutosoft is a real disruptor in the fintech space. It has far exceeded my expectations.

Mark Malone (Founder/Director)

About Birling Private Wealth

No. of Employees
1-10

Measurable Impacts:

- * A customisable solution we can configure as we grow
- * Everything is done in ONE system
- * Greater client engagement that drives new business

