



Forty Seven Financial Planning

The Challenge

Five years ago, we set ourselves a challenge to be world class in three areas:

- The client experience
- The efficiency of our practice
- Our compliance obligations

The technology we were using was lacking. We spent a considerable amount of time duplicating data, formatting and performing admin tasks that only increased with the addition of new clients. We knew we needed a new technology solution to help us to achieve this.

The Solution

We started our journey with Plutosoft five years ago and we now use it across all areas of our business. The software is intuitive, easy to use and the automation of workflow has saved us a huge amount of time, whilst ensuring essential tasks are not missed. Our compliance deadlines are automated and appear on a dashboard giving us a company view across all clients.

The Result

The productivity gains have been outstanding, and we have a much tighter control over our compliance obligations. Our client engagement has improved immeasurably, and our SoA production time has reduced by over 80%. Instead of being buried and let down by legacy software, we are now excited about the future.

“**At last our industry now has a world class end to end software solution that really makes a difference to our clients and to our business.**

John Holland, Principal

About Forty Seven

Number of Employees

1 – 10 employees

Measurable Impacts

✓ Client engagement has increased significantly with 80% of clients using the portal

✓ The preparation of ongoing client’s advice documentation has reduced from 7 hours to 1 hour

✓ Our client base has grown; however our monthly costs have reduced by 23%

✓ The continued innovation plan in Plutosoft enables us to benefit from all new enhancements

