



Chalmers Private Wealth

The Challenge

Our previous software, which we had used for many years, became very modularised. The modules didn't integrate well resulting in excessive data entry. It had a clunky and complicated interface and offered limited client interaction. Building SOAs and client reports were difficult and inefficient.

The Solution

We decided to adopt an alternative system and chose Plutosoft. We were drawn to its modern architecture and intuitive user experience. Initially, we ran it alongside our previous software while working to obtain our own AFSL.

Shortly after using Plutosoft, it was an easy decision to shift completely and use Plutosoft as our one source of truth. It replaced our legacy software and helped us gain greater efficiency on advice production and more control over compliance.

The Result

Plutosoft has introduced innovation into our business that has changed the way our advisers are presenting their advice. Its graphical interface and simplistic nature allow for interactive modelling which provides our clients with a lot more understanding and confidence about our advice.



Plutosoft has provided us the ability to be innovative and streamlined and enabled us to build more capacity and service our clients better and more efficiently!

Jacky Chalmers (Operations Manager)

About Chalmers Private Wealth

Number of Employees

11-20 employees

Measurable Impacts:



Its intuitive nature enables non-technical staff to assist in preparing more complex advice.



A big improvement to efficiencies as report templates can be tailored in-house and data only needs to be entered once.



More innovation in the way we present advice which gives our clients more confidence about our services.

