



## Fenton & Associates

### The Challenge

Our key challenge was the increasing need to improve the efficiency of our client and business processes.

As a well-established firm with many clients to manage, it was important that we were not having to run multiple software systems and double hand data.

With our existing software, we were spending too much time editing and re-entering client information both before and after advice production.

### The Solution

After investigating several different software providers, we decided to adopt Plutosoft. We started using Plutosoft in February 2020 and chose it because it is:

- An intuitive, end-to-end solution.
- Highly customisable to our business needs.
- Able to produce our client documentation more efficiently - SoAs, RoAs, Review Reports etc.
- Able to effectively assist with the management of our workflows.

### The Result

We now have a holistic system which fluidly and intuitively captures all stages of the advice process and enables us to efficiently produce many, varied high-quality client documents each week, while also providing the tools that enable us to meet our administration and compliance needs. As a busy firm, these are real value adds.



**Plutosoft enables us to do everything we need in one powerful package!**

**Lisa Kovacs (Director)**

### About Fenton & Associates

#### Number of Employees

11 – 20 employees

#### Measurable Impacts:

- ✓ A big efficiency improvement to our advice production, workflow management and compliance
- ✓ A system that can be customised to our needs
- ✓ A complete one stop shop from initial fact-find to finalisation of the advice

