Nexia Perth Financial Solutions

The Challenge

When our Perth office launched a new financial services division, we set out to implement a new software platform.

As a self-licensed firm, we were looking for software that could help us to customise and create our own document and workflow templates and to present our advice in a client friendly manner.

The Solution

We came across Plutosoft at the FPA conference in 2019. We had looked extensively at various software packages both old and new.

We found that the legacy systems required a significant investment in time and cost to customise the document and workflow templates. On the other hand, some of the newer applications we assessed didn't seem quite advanced enough to meet our requirements.

We ended up choosing Plutosoft as it struck the right balance. It had the benefits of a modern system with interactive cash flow graphs projections, and dashboards. At the same time, we felt it had the depth and sophistication needed in our business.

The Result

Plutosoft provides us with the tools we need to generate our advice, customise our documents and to facilitate more meaningful conversations with our clients. It has also helped us to showcase the benefits of the advice process to the other service decisions in our firm, with its intuitive left to right format.

" Plutosoft has provided an easy-to-use client-engagement tool that allows us to have meaningful conversations with our clients.

Fran Hughes (Director)

About Nexia Perth Financial Solutions

Number of Employees

80-90 employees (across Australia)

Measurable Impacts:

- ✓ Easier and more cost effective in building advice templates.
- ✓ A great client engagement tool with cash flow, modelling, graphs, etc.
- ✓ Plutosoft focuses on the advice generation first and foremost, making the steps to advice generation logical from fact find stage to generating the report.