



BIRLING PRIVATE WEALTH

BIRLING PRIVATE WEALTH AT A GLANCE

NO. OF EMPLOYEES

1-10 employees

MEASURABLE IMPACTS

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

"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

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 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 reduced client on-boarding time by 50% while still meeting all compliance requirements. 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. Everything is done in ONE system from beginning to end providing real benefits for us. The efficiencies gained now 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.

