



PROSPERITY ADVISERS

PROSPERITY ADVISERS AT A GLANCE

NO. OF EMPLOYEES

150+ employees

MEASURABLE IMPACTS

- ✓ An intuitive, clean interface which allows us to customise and manage all of our workflow and report templates without the need to outsource
- ✓ A collaborative team who are great to work with and always open minded to enhancements
- ✓ A single system that covers all our advice needs in one

*“Plutosoft sits in the perfect sweet spot between being an established, mature, proven system and a **nimble, adaptable solution!**”*

HAMISH LANDRETH
Director Financial Services

THE CHALLENGE

After embarking on a journey to become self-licenced, we needed to find a financial planning software solution that could incorporate the entire CRM, advice process, workflow and client hub functionality across our practice of financial planners and accountants.

The previous software we had adopted created many challenges including:

- Lack of customisation;
- Slow response time to queries; and
- A clunky user interface combined with double entry of data.

THE SOLUTION

We came across Plutosoft in an article publication which referenced several new technology providers. After researching and trialing the various systems, we decided to adopt Plutosoft in March 2021.

The implementation of Plutosoft exceeded expectations. The team were very proactive throughout the onboarding process and the migration of data from our previous CRM was seamless.

Its clean, intuitive interface also makes it easy for a practice like ours to customise our own report templates and manage these ourselves without needing to outsource this function.

THE RESULT

We have adopted Plutosoft as our all-in-one financial planning solution across our advice business. We now have an efficient, customisable system that can manage all our CRM, advice, workflow and client engagement requirements.

