



# REGIONAL FINANCIAL SOLUTIONS

## REGIONAL FINANCIAL SOLUTIONS AT A GLANCE

### NO. OF EMPLOYEES

1-10 employees

### MEASURABLE IMPACTS

- ✓ Simplified processes and workflow configured specific for our business needs.
- ✓ Time savings! From input of data to output of advice documents.
- ✓ Meets all our compliance requirements.

*“Plutosoft has revolutionized our business! It is the total solution we had been looking for.”*

**ASHLEY MONTESIN**  
Financial Planner

## THE CHALLENGE

We were changing our licence and moving away from having mandated software that didn't fit our business processes. We were looking for a new system that provided better functionality and fit than the likes of X-plan and other traditional CRM systems provided.

## THE SOLUTION

We were fortunate to come across Plutosoft and signed up in October 2019. We immediately liked it's ease of use, functionality and modelling capabilities, it aligned with our business from the get-go. Our onboarding and implementation process was very smooth and guided by the great team at Plutosoft. All our data was imported with no issues and no loss of data. The team was very hands-on and felt like part of our team, which matched our partner alignment requirements.

## THE RESULT

We were producing advice documents from the system by January 2020. Only inputting data once has been a great time saver! We are now very easily able to produce reverse FNA's in a fraction of the time. All our team members love the functionality, ease of use and how intuitive the system is. We used X-plan for years but never really mastered it, Plutosoft has been a very different and welcome experience.

