



WEALTH DIMENSIONS

PROTECT - GROW

WEALTH DIMENSIONS AT A GLANCE

NO. OF EMPLOYEES

1-10 employees

MEASURABLE IMPACTS

- ✓ Data is easy to capture, and workflow processes ensure nothing is missed.
- ✓ Great client experience as it is visually appealing.
- ✓ We feel confident, more in control and able to focus on providing quality advice.

“We wouldn’t have been able to grow our business at the rate we have without the process improvements that Plutosoft has been able to deliver.”

ROB JESELNIK

Director

WEALTH DIMENSIONS

THE CHALLENGE

As a single advisor practice, I wear many hats. Prior to Plutosoft I was using XPLAN which overall I found was too slow and lacked efficiencies. The output of reports required considerable time to edit and there was no ability to customise our own templates. We also had to use separate programs for some client and business management tasks as the software was not able to be tailored to our business processes.

We were looking for a total end-to-end solution for client management, advice production, business reporting and a client portal for client engagement.

THE SOLUTION

The trial experience gave us a real feel for the product and how much control we could have over our own templates and output. Plutosoft provides a total end-to-end solution which didn’t take us long to embed in our practice. It delivers a great client experience as it is visually appealing and a great interactive tool in client meetings.

THE RESULT

Since using Plutosoft, we have reduced total time spent per client file which has enabled us to grow our customer base. Data is easy to capture, and agile workflow processes ensure that nothing is missed. We feel confident, more in control and able to focus on providing quality advice.

