

LDM PRIVATE WEALTH

LDM PRIVATE WEALTH AT A GLANCE

NO. OF EMPLOYEES

1-10 employees

MEASURABLE IMPACTS

- ✓ Our advice generation process has reduced from three days down to one
- ✓ The ability to customise and create our own report templates gives us the flexibility we need to make changes when required
- ✓ An effective workflow tool ensures that nothing is missed

“Our advice generation process is three times faster using Plutosoft.”

MATTHEW DRAGOVIC
Executive Financial Adviser

THE CHALLENGE

Before coming onboard with Plutosoft I had used a myriad of different applications – Midwinter, COIN, XPlan, WorkSorted – none of them provided the end-to-end solution I had sought. We joined Plutosoft back in 2020 and haven’t looked back since.

THE SOLUTION

Previous systems didn’t allow us to produce advice documents easily, data feeds were either not available or not correct and it was a very manual process. The efficiencies we were looking for have been achieved using Plutosoft – our ROA process is now seamless and can be done internally without additional resourcing. Our advice generation process has gone from three days down to one, which is a huge time saving.

THE RESULT

I feel much more comfortable with the software I have. I can rely on Plutosoft and hold a lot more confidence with it compared with past systems. I love the ability to customise our own templates within the software rather than dealing with poorly functional word documents, this has been a massive shift that we can create our own reports as needed. Workflow management is no longer external to my CRM, this ensures that we are on top of things, and nothing gets lost in the process which is critical for our business.