advisor forms

Are you still relying on manual data entry?

The average advisor spends 1.5 hours per client inputting their basic information.

Wouldn't it be easier if you could process new client data at the click of a button?

The Situation

The paper chase

WHEN AN OUTDATED SYSTEM BECOMES A BURDEN

Are you spending hours each week on manual data entry? If you feel like you're constantly bogged down with administrative chores then it's time to rethink the way you collect and process your clients' data.

Simply processing a new client shouldn't mean scanning forms, sending emails, waiting, chasing up, downloading documents and copying data into your systems. This sort of paper chasing is not only stressful, but prone to transcription errors that can lead to compliance issues down the track.

If this clunky, time-consuming process sounds familiar, it's time to discover a simpler way. AdvisorForms helps you streamline your client data capture so you can spend less time on data entry, and more time advising.

The digital answer

PLAN FOR A FORM-FREE FUTURE

AdvisorForms is the simple, digital solution to a messy, paper problem. By digitising the capture and storage of client data, AdvisorForms streamlines your onboarding process (what client doesn't love a smooth welcome?) and saves you hours of data entry.

Our sleek online portal provides a space for clients to fill in any relevant forms online, to be reviewed by you at the click of a button. Once forms are reviewed by both parties the data automatically populates in your system. Integrate AdvisorForms with your existing software systems and the data automatically syncs to avoid costly errors and mismatched information.

There are no more piles of paperwork and no data entry. Just a single, simple solution.

The Process

A simpler way

Discover a stress-free way of collecting and consolidating your clients' details. It's easy to use, convenient for clients, and automatically moves your data to your current systems for practice-wide accessibility. What could be simpler?

Email

Send the client an email with a link to the form

Fill

The client fills in the form via the online portal

Review

Review the data with your client to avoid errors

Sync

Sync data into your existing software systems

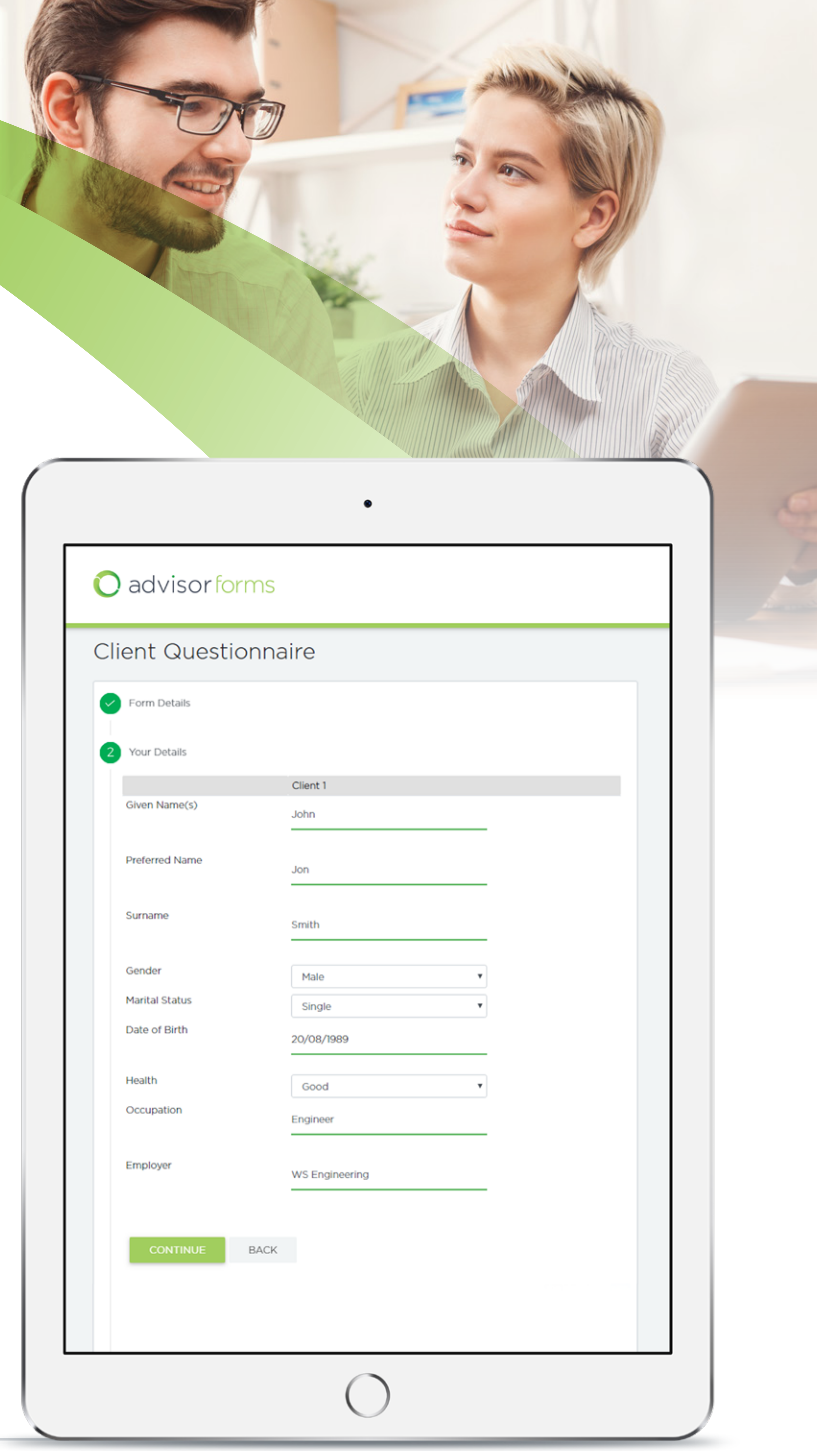
Data Capture

Ditch the data entry

Send and receive forms in one easy-to-use portal.
No scanning. No printing. Just simple, digital data capture.

Use the online AdvisorForms portal to collect all the data you need from new and existing clients. The client can provide (or update) their details anywhere, any time without the need to return a paper or scanned copy. Existing clients can review and confirm their details without having to fill in new forms each year. There's no paper handling and no manual data entry. Just log in to see all of your clients' data.

- ✓ Customise forms to capture relevant data only
- ✓ Avoid transcription errors with built-in error checking
- ✓ Save drafts
- ✓ Receive alerts when forms are completed
- ✓ Automatically update data in your systems



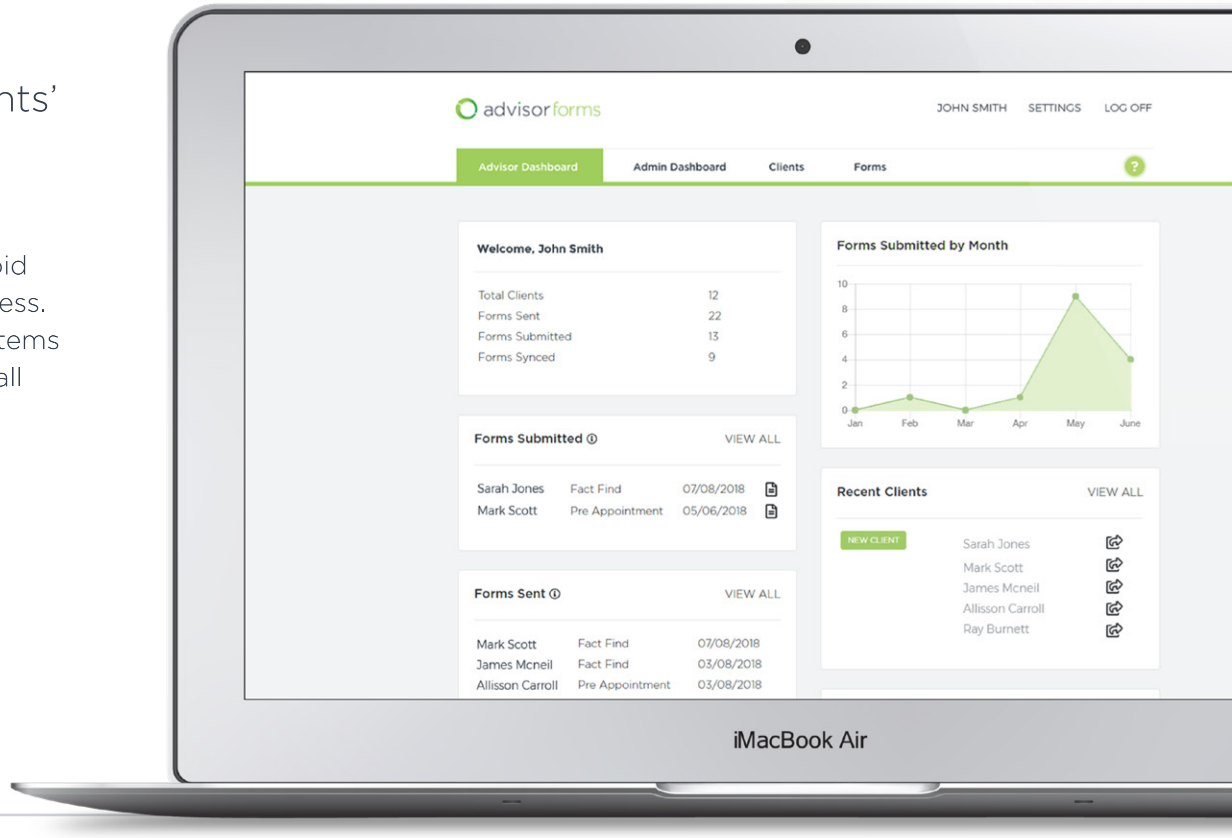
Consolidated View

Your client data hub

No more shelves of binders. View all of your clients' data in one central, easy-to-use dashboard.

A user-friendly dashboard gives you an overview of the status of your clients' forms. Check for outstanding forms, review data to avoid compliance issues or simply track your team's input to assess progress. AdvisorForms lets you pull, review and confirm data from other systems to avoid double handling. Centralise all of your clients' details from all systems so you can get rid of the binders for good.

- ✓ Rely on a single technology (no dodgy scanners or printers)
- ✓ Ensure your clients' data is secure
- ✓ Ensure data is correct and compliant
- ✓ Easily find client details



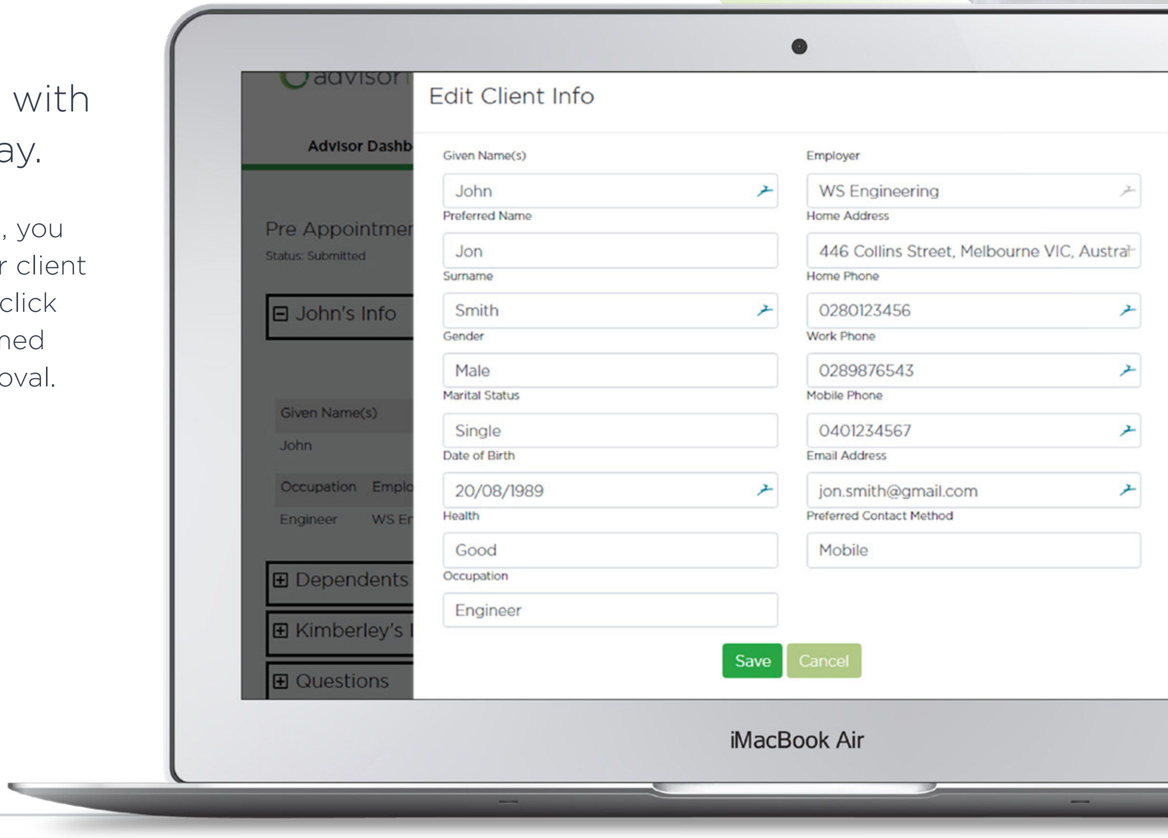
Form Review

One-click tick of approval

Don't waste any more time to-ing and fro-ing forms with your clients. Get the data you need, without the delay.

As soon as your client fills in their details via AdvisorForms' online portal, you can access and view the data. Review the form in collaboration with your client to ensure all details are correct and then simply approve the data at the click of a button. Even existing client information can be reviewed and confirmed without having to send out new paper forms. It's a one-click tick of approval.

- ✓ Process new forms quickly and efficiently
- ✓ Review forms at the click of a button
- ✓ Collaborate with clients live
- ✓ Confirm existing data



Integrations

Keep it connected

Seamlessly integrate AdvisorForms with your current systems to ensure data integrity across the practice.

AdvisorForms ‘talks’ to your financial software to populate and update client details across the practice. Establish a single source of truth by transferring client data between AdvisorForms and XPLAN, Xeppo, MYOB and other systems. Two-way syncing with XPLAN lets you import and export client data as necessary in a fraction of the time it takes to input the data manually. Don’t use XPLAN? No problem. Talk to us about our custom integrations.

- ✓ Sync, import and export with ease
- ✓ No more double handling data entry
- ✓ Connect client data from siloed systems
- ✓ Data uniformity across the practice
- ✓ Integrate with XPLAN, Xeppo, MYOB and custom

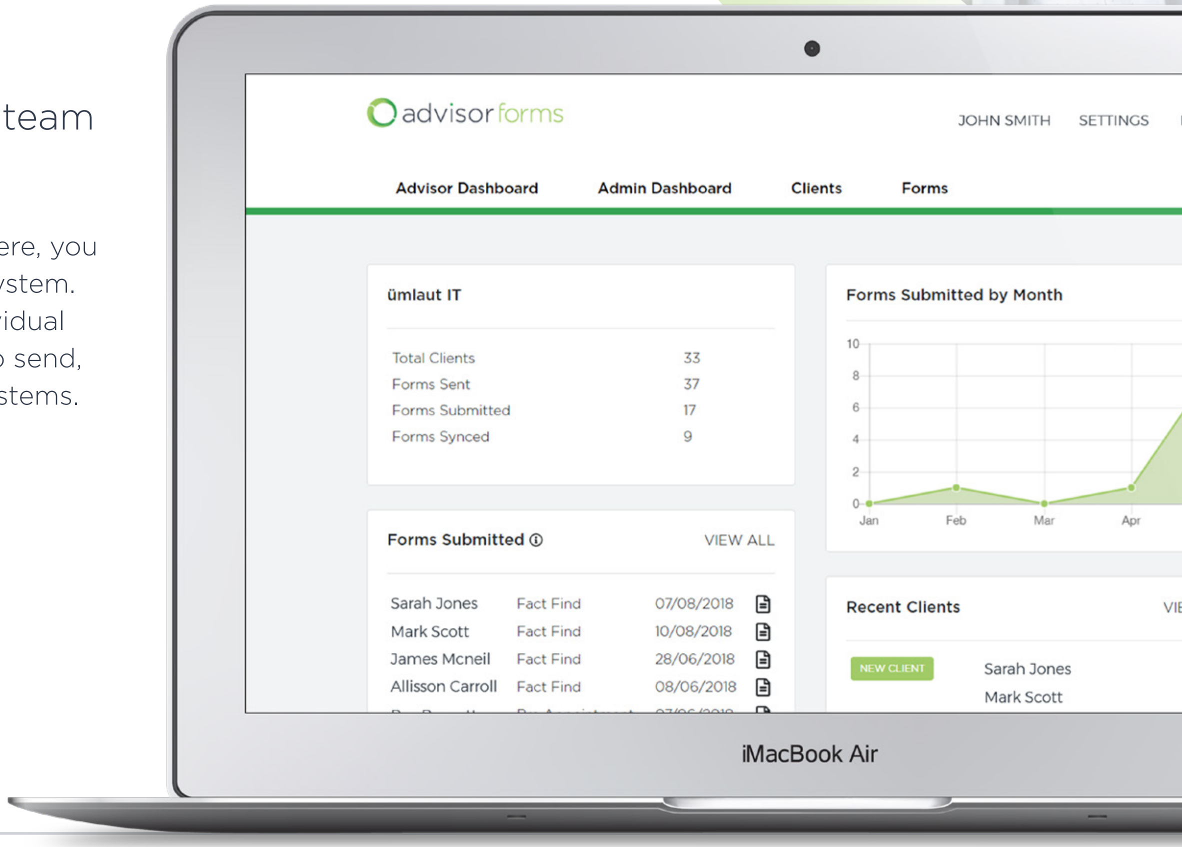
Admin Features

Keep track of your team

Do you run a team of advisors? Keep track of your team and clients from one beautiful, functional interface.

View all of your team's clients in a beautifully-designed admin portal. Here, you can easily access client details and monitor the status of forms in the system. You can also compare monthly inputs to track the performance of individual team members and the firm as whole. Staff can use their admin login to send, receive and redistribute data between advisors, clients and software systems. All advisors are automatically added from XPLAN.

- ✓ Monitor form status on a sleek interface
- ✓ Compare monthly input on a user-friendly dashboard
- ✓ View all of your team's clients and forms
- ✓ Automate distribution of renewal forms



Where to next?

Book a demo

Book your virtual demonstration of AdvisorForms with Umlaut today.

- ✓ Have a one on one online demo with our knowledgeable consultants
- ✓ View the interface and see how it works
- ✓ Get answers as you go through
- ✓ Find out how this can save you time and money

CLICK HERE TO BOOK YOUR DEMO

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