



Financial Planning Solution

Who is SYNCRM?

SYNCRM is a **privately owned Australian** company that was established by a financial planner out of frustration with incumbent financial planning software.

Our solutions are being developed by a dedicated team of application designers and developers, with **significant input** from financial planning practitioners.

We appreciate each client as **unique** with specific needs for their business; our solutions are completely customisable and modular, so you can choose what you want for your business.

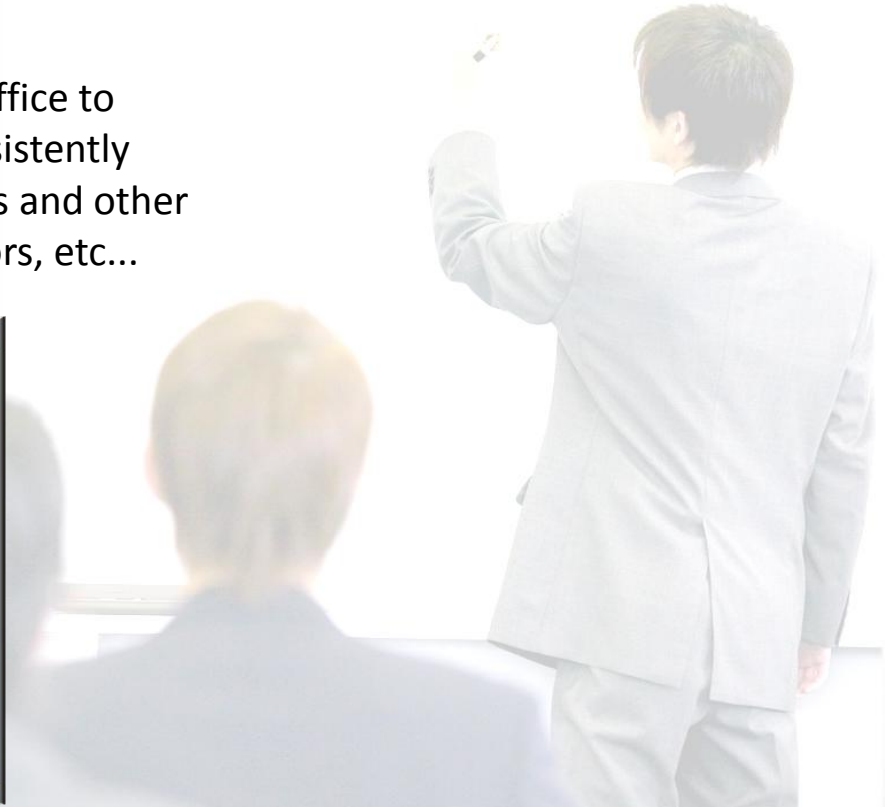
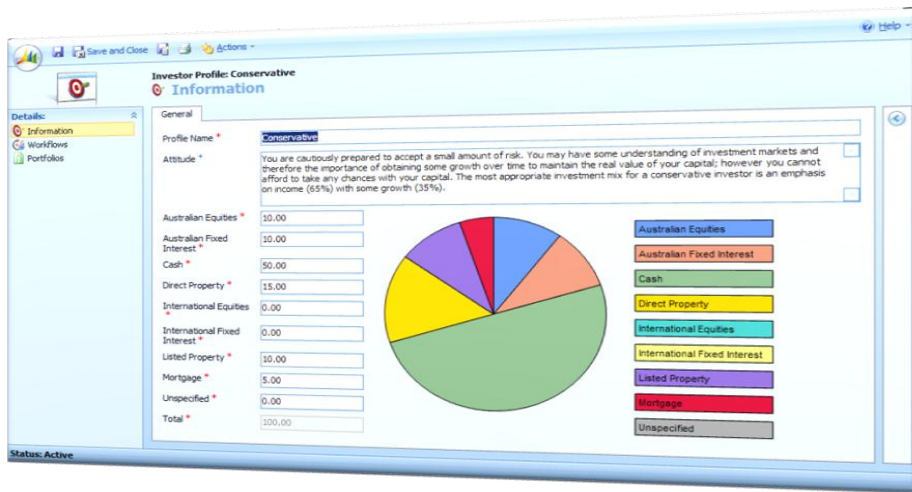
Our goal is to **reduce costs** and **increase service quality** by **SYN**chronising **C**ustomer **R**elationship **M**anagement software in your business operations and integrating with other information technology solutions.



What is FPS?

FPS is a purpose built **Financial Planning Solution** that integrates with a number of leading Microsoft products.

FPS utilises Microsoft Dynamics CRM and Microsoft Office to deliver an efficient and effective environment for consistently managing their interactions with clients, dealer groups and other associated professionals, such as Accountants, Solicitors, etc...



Why Microsoft Dynamics CRM?

Your business is in a constant state of flux. Keeping up isn't enough—you need to keep ahead. And that's why forging strong client relationships and growing new relationships has never been more important.

At its core, CRM involves three basic steps:



Why Microsoft Dynamics CRM?

Flexibility and integration are also important. You should be taking advantage of the tools your professionals already know and use.

Your business processes should not work around software, software should work around business processes.

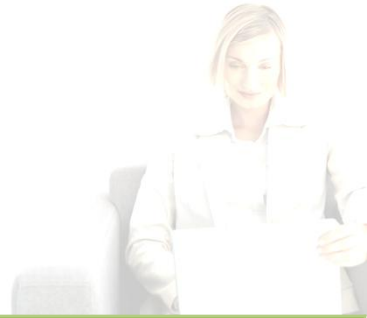
With this in mind Microsoft Dynamics CRM was our first choice.



How does this relate to financial services?

- ▶ Increase qualified sales leads to attract more clients.
- ▶ Retain more clients through improved client loyalty.
- ▶ Spend more time with clients and less on administrative tasks.
- ▶ Maximise cross-selling/up-selling opportunities.
- ▶ Use automatic workflows to increase employee effectiveness.
- ▶ Share complete client information across existing systems.
- ▶ Reduce your exposure to technology related risks.





How does FPS compare with competitors?

	COIN Office	IRESS VisiPlan	IRESS XPlan	SYNCRM FPS
Provides interfaces to data feeds from external data suppliers.	X	X	X	X
Portfolio modelling, rebalancing and tax analytics.	X	X	X	X
Collection of smart calculators for financial planning.	X	X	X	X
Contains more than 10,000 investment products, including managed funds and Australian share market stocks.	X		X	X
Solution for building templates, merging data and managing templates centrally and compliantly.	X		X	X
Allows advisors and support staff to stay on top of all scheduled tasks.			X	X
Provides a mechanism for running automated, exception-based rules across their client database.			X	X
Enables you to produce target marketing lists or a mail merge file for clients who have certain characteristics.		X		X

What else does FPS offer compared with competitors?

	COIN Office	IRESS VisiPlan	IRESS XPlan	SYNCRM FPS
Comprehensive, Customisable, True Client Relationship Management.				X
Data management features such as duplicate detection, bulk import, data mapping.				X
Advanced Custom Searching - find records with criteria in one field or a second field, with criteria including values from related records, and with criteria from many activity types.				X
Export any data to Microsoft Excel as static worksheets or dynamically linked worksheets.				X
Comprehensive, customisable roles based security model.				X
Integrated inside of Microsoft Outlook for both on-premise and hosted solutions.				X
Control business process and customise them to match your business.				X
Integrated with Microsoft Exchange for tracking your emails for compliance.				X
Adaptive workflow engine and simple workflow interface.				X

So how does this extra functionality benefit my business?

Microsoft Dynamics CRM + FPS work as a natural extension of Microsoft Office Outlook and the Microsoft Office system, delivering a familiar solution that promotes fast user adoption and higher utilisation. By providing centralised access to information, consistent processes, and real-time insight, you can empower a more consistent, productive company. After all, your main goal is to provide unrivalled quality service, not to spend time figuring out how to use software.

Information you can understand and put to work quickly is key in your competitive world. Our solution transforms your data into knowledge, from prioritising leads to recommending strategic cross- and up-sell opportunities. You can even combine data with integrated workflow to respond in real-time to your business changes.

Current financial planning softwares are limiting for businesses in user personalisation, deployment configuration, customisation, integration and extending specific functionality.



I'm still not convinced, Why should I choose FPS?

With increased consolidation in the financial services industry, large institutions continue to get larger while small to midsize businesses require new and innovative strategies to remain competitive, create growth opportunities, and contribute to the bottom line.

In this highly competitive marketplace, your company needs a solution to help differentiate it from its competitors.

You should be looking for ways to gather insight into client needs and preferences to offer more relevant, personalised products and services.

Automating and streamlining day to day processes, FPS brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

