

April 16, 2007

Asgard launches second phase of AdviserNETgain

Asgard Wealth Solutions will today launch the second phase of its new integrated financial planning and practice management technology – AdviserNETgain - in a move that is set to revolutionise the way financial planners manage their practices.

The new technology which wraps a range of relationship and practice management, workflow, portfolio planning and marketing tools all into one package was first launched to the market in November last year with more than 175 advisers now using the technology, and 70 practices on a waiting list for implementation.

From today, the much anticipated integrated advice engine, which among other things will allow users to generate statements of advice online, will be added to the vast list of capabilities advisers can now access literally at the click of a mouse.

Asgard head of distribution Wayne Wilson said adviser technology would be the grounds on which the battle of the platforms would be fought and won, and the launch of the second phase of AdviserNETgain puts Asgard at the forefront of the race to deliver the next-generation in online business solutions for advisers.

“It is a business solution which is supported by the combination of technology and platform access that gives us the industry-winning formula*,” Mr Wilson said.

“In an industry first, AdviserNETgain boasts a single data entry point that seamlessly integrates an adviser’s front office processes, such as SoA generation and workflow tasks, with their back office activities like product transactions and administration. The new technology is directly linked with the Asgard platform, allowing advisers to automate their operations, reduce their costs, and minimise processing errors,” Mr Wilson said.

“The new solution will also give advisers the capability to report not only on the Asgard investments held by their clients, but also their non-Asgard investments.”

Mr Wilson said Asgard’s new integrated solution is of the next-generation – advice-centric, user-friendly, and complete in its ability to give planners full support.

“We know that in order for advisers to deliver quality advice and run profitable, efficient practices they need the right technology.

“In fact, built on our multi-award winning adviserNET platform, AdviserNETgain has been developed in direct response to feedback from advisers about what they needed to run efficient, profitable practices. Overwhelmingly they agreed they needed technology that was efficient and simple to use, with a single data entry point, that was advice, not product, based,” Mr Wilson said.

“AdviserNETgain, delivered to advisers as promised on time and to scope, is a total business solution. For example, being able to record the initial client contact through to generating compliant and personalised SoA documents by only having to input client’s data once into a single system, will increase efficiency and accuracy and ultimately reduce costs.

“This is what AdviserNETgain is all about - helping advisers gain efficiency, gain productivity and gain more time to spend with their clients.”

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Mr Wilson said adviserNET would continue to be available to advisers and would remain a prominent part of the Asgard business.

*AdviserNETgain was ranked number 1 in the 'hybrid' category by Investment Trends in their Competitive Analysis Report, 2006
^ Best online service for financial advisers as judged by independent expert Investment Trends in their Competitive Analysis Reports for 2004 and 2005

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