

# Why Australia's No.1 Financial Planning Software achieved a 98% positive impact score\*

\* Australian Digital Technology Awards' Brand Performance Report 2021

"Astute provides a process that is driven by technology and real client-adviser experience.

Gathering client's goals, objectives, data and how they feel about their financial health can all be gathered using online forms.

Since we embedded AstuteWheel into our practice the **take up of our review offers has grown** and

the **value we are adding** through being able to efficiently model a range of advice strategies on the spot has definitely strengthened our client relationships and delivers a much more impressive new client experience."

Mark McNeany, Director  
**Vertex Group VIC**

"When we used our old 'client engagement' process it took forever to get a response, if we got one at all, and going through it in a face-to-face meeting was a nightmare.

Within just a few weeks all those clients who had ignored our big document, responded. **We ended up with 21 active plans that needed to be completed!**"

Shannon Smit, Director  
**Smart Business Solutions Financial Planning VIC**

We are using Astute Wheel's client engagement tools and best practice processes to enhance the client experience. This transition commenced in 2014 with immediate favourable outcomes, as recognised by our dealer group **Count Financial Limited**, for three years in a row: **"Member Firm of the Year"** and **"Excellence in Client Engagement"** award for building long term trust and relationships and having demonstrated engagement strategies to put our clients in a stronger financial position.

To be recognised for these awards and for our new service offering is something we are immensely proud of and believe that we have built a

platform for greater future success. Our enhanced processes allow us to assist many individuals in our local area in meeting their personal financial needs and have their tax and personal/business advisory questions resolved.

The award was a great honour and we're delighted to have received this recognition. The best part of winning is the knowledge that you're **making a difference to the lives of people, helping them with their financial future and ensuring they get financial advice with a personal touch.**

Barry Hayes, Director  
**Hayes Girling Financial VIC**

"Since the outbreak of COVID-19, AstuteWheel has been a major positive and confidence boost for our clients when they need our help and reassurance most.

**The ability to share our screen and run live scenarios, give instant projection outcomes and run different scenarios has been extremely efficient and reassuring for our clients.**

The 5 minute health check and other tools have received some very positive feedback from clients. Projection tools and reports also received great praise from our staff and clients.

The simple generation of thorough file notes supported by facts, figures and calculations, along with the necessary client verbatim and planner commentary is **a game-changer for us."**

John Hazell Principal Partner  
**Birling Wealth Management NSW**

"A complete re-engineering of our client engagement process, building greater client connection and care, and importantly by **streamlining the adviser meeting experience.**

The **client experience is perceived as being far more valuable** and our **conversion rates are higher."**

James Malcolm, Director  
**Crescere Partners NSW**

"The digital fact find completion, health check is a great tool and very valuable to us. The individual calculators are very handy and I enjoy using these. Scoping and the subsequent Client Engagement Letter is very good, and we have managed to **increase our initial advice fee by about 40%**

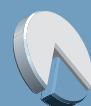
Werner Jansen,  
Financial Planner  
**Burford Partners NSW**

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