

## CashCalc integrates with Intelligent Office

NEWPORT, WALES -- November 16, 2017 -- CashCalc, the leading provider of cashflow planning software, today announced an integration with leading back-office provider, Intelligent Office. The integration, which will enable thousands of financial advisers to seamlessly pull client data from iO into CashCalc, was created to provide greater efficiencies within the financial planning process.

Until now, all clients and data entered into Intelligent Office have had to be re-keyed into CashCalc. However, the integration aims to reduce the time spent re-keying data while increasing data accuracy.

The client data which can be pulled from iO into CashCalc includes:

- Personal information
- Savings & Investments
- Incomes & Pensions
- Assets & Liabilities

Ray Adams, Director and Chartered Financial Planner at CashCalc, said: "As a practising financial adviser, I understand the importance of integrations and I expect the systems I use to interact with one another. Today's announcement is a major step forward to help us (as advisers) become even more productive and we are thrilled to see CashCalc integrate with Intelligent Office."

To set up the integration, advisers are encouraged to visit the recently launched iO Store. Here, advisers will need to install the CashCalc app and then follow the simple step-by-step process. The whole process will take only a matter of seconds.

Nick Eatock, Executive Chairman at Intelliflo, said: "I am delighted to welcome CashCalc into the iO Store. This integration will save advice firms a lot of time and drive efficiency in their business. By no longer having to re-key data, advisers will also be able to achieve increased data accuracy. A number of our users also use CashCalc, so this integration is a no-brainer and I expect that it will be widely used."

To find out more information on the CashCalc integration with Intelligent Office, visit <https://cashcalc.co.uk/blog/2018/02/16/integrate-with-intelligent-office/>. Or to set up the integration, visit <https://intelligent-office.store/published-apps/9170cee>.

## About CashCalc

CashCalc ([www.cashcalc.co.uk](http://www.cashcalc.co.uk)) offers market leading cashflow planning software that enables financial advisers to create detailed and precise financial plans without any of the unnecessary complexity. Our mission is to make the financial planning process simpler, more visual and more productive with incredibly powerful and intuitive tools. We believe in simple inputs, complex calculations, powerful outputs. CashCalc is based in Newport, Wales and serves nearly 7,500 users in the UK alone, with further financial advisers based in 5 of the 7 continents. Developed and run by a team of practising Chartered Financial Planners, the company has growing beyond recognition since its launch in May 2014:

Total number of users:	2,853 in 2016	7,442 in 2018
Total number of clients entered:	19,113 in 2016	84,231 in 2018
Total number of forecast created:	43,824 in 2016	421,933 in 2018
Total number of Data Capture Forms completed:	571 in 2016	11,560 in 2018
Total number of tools available:	22 in 2016	26 in 2018

## Contacts

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