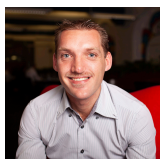


## eNEWSMONTHLY



### What's Coming



#### Let's Get Digital- FactFind and Signed

It's no surprise that the world of the future is going to be fast. More touch points, more data, more digital, more ways to learn and look at the world through a technology lens. To some it may be overwhelming, but rest assured the only way forward is digital. So whether you want to collect data, get connected, send data

or digitally sign documents we have you covered.

#### Connect Data from Xplan - CRM

With Digital FactFind we've automated the way you can collect data from your CRM system, initially via Xplan. So, how will it work?

##### Step 1: Select Import

Invite new user

Moneysoft Lite  Moneysoft Pro

First Name \*  Last Name \*

Email \*

Invite client to Generic Fact Find  Import data from XPLAN

Modules

- Basic Information
- Insurance and Health Information
- Risk profile
- Estate planning
- Fact Find documents
- Goals and objectives
- Income and expenses
- Employment details
- Retirement objectives

CANCEL SEND INVITE

##### Step 2: Connect

Invite new user

Moneysoft Lite  Moneysoft Pro

First Name \*  Last Name \*

Email \*

Invite client to Generic Fact Find  Import data from XPLAN

XPLAN User name  XPLAN Password

Choose XPLAN record

##### Step 3: Choose your client

Invite new user

Moneysoft Lite  Moneysoft Pro

First Name \*  Last Name \*

Email \*

Invite client to Generic Fact Find  Import data from XPLAN

Client list:

- Harry Houdini, Male, 12/05/1950
- Bess Houdini, Female, 05/06/1950
- Thomas Young, Male, 08/12/1970

Estate planning  Retirement objectives  Fact Find documents

With just those three simple steps your clients will have their own new digital portal with a built in Digital FactFind and a range of supporting modules available to display client information, goals, benchmarking and people like you comparisons, calculators, risk profile, chat bots, employment and a FactFind document.

And if you are worried about compliance, we have that covered too. Your FactFind version will be your own licensee's compliant version. Send it through and we will brand it in your portal so your clients can start updating their data.

#### Select, Connect and Sign

There is no point in doing 90% of the work digitally and then having to print it off to have it signed. So in just a few weeks time you will be able to select, connect and have your clients digitally sign their document using one of two initial providers to choose from.

Step 1: Select your provider

Step 2: Connect

Step 3: Client digitally signs

E-SIGNATURE

DocuSign

Adobe Sign

DocuSign

Please log in to your account

Email address

No account? Sign up for free

Electronic Communications

I do not confirm  I do not confirm

I hereby agree to a contract with the internet and email file to receive material in an electronic format including but not limited to email, USB and other file storage devices, and internet hyperlinks.

We will notify you should you wish to cancel or change this agreement, including changes to transfer preferred email addresses.

We understand that consenting to electronic delivery means paper documents may not be provided. We confirm that we have the ability to access, view and store electronic documents. We understand that neither Moneysoft nor its practice nor Future Finance Wealth Limited will accept liability for any loss or damage arising from electronic access associated with electronic communications.

Signatures

Client 1	Client 2
<input type="text" value="Moneysoft Dev"/>	<input type="text" value=""/>
Date <input type="text" value="2020/05/20 10:20"/>	Date <input type="text" value=""/>

Again, just three steps and you're done. Your client's very own, digitally signed document, stored within the Documents vault. One easy secure place, perfectly digitally organised. Stay tuned for more updates as we continue to complete this development. Till then, stay safe.

#### Moneysoft and Xplan IPS - Incomparable Together



#### Now Live!

As reported, iress is pleased to announce the release of the Moneysoft IPS data feed. The data feed will supply data for all Moneysoft Accounts (transactions and balances) where the client has granted their Adviser access within the Moneysoft system. The data will be visible in Xplan in the Portfolio module.

To get started with your Xplan and Moneysoft IPS connection visit <https://www.moneysoft.com.au/professional/xplan-ips-integration> or speak to your Xplan account manager.

A big thank you shout out to the @Xplanteam for developing and supporting this feed. As always we are also very blessed and thankful to our customers for their feedback and testing during the development phase.

This integration is new and complimentary to the existing Client Focus Budget integration detailed at <https://www.moneysoft.com.au/professional/xplan-integration-process/>

Peter Malekas - Director and Founder



**Webinar Series: Budgeting and Cash Flow with Moneysoft in the middle of a financial crisis.**

As the financial impact of the Covid-19 pandemic starts to take shape amongst the households of our clients, we recently hosted two webinars with Steve Crawford from Your Spending Coach (YSC).

These focused on using Moneysoft to quickly set up a budget, analyse cash

flow and equip you to more effectively advise clients.

The first webinar was a great success, quickly filling up and registrations closing early. The second was also a hit, organised specifically for Count Financial and their advisers.

Feedback has been excellent with the most common theme being how helpful it was to see a real, practical example with Moneysoft. Advisers were thrilled to see a live example of how quickly and efficiently Moneysoft could produce meaningful cash flow and budget information that can be acted on immediately.

Further take aways included:

- How Moneysoft can conveniently enable practices to utilise data in their own processes
- Utilising YSC's Moneysoft white label to learn from Steve Crawford and his courses and methods
- How quickly Moneysoft can collate a client's financial situation and help advisers to develop an immediate action plan.

We'd like to say a special thank Steve Crawford for his compelling demonstrations. Stay tuned for the announcement of the next in our webinar series and be sure to register quickly as spaces once again will be limited.

Steve Davis - Head of Sales

## 50% Moneysoft Mates Rates

**Moneysoft Website Update**

We have continued to make improvements to our website, adding some new articles to support the new Xplan IPS integration.

Work on the website is ongoing and we will continue to improve the information we present to make it more relevant and intuitive.



**Individual Clients Tab Loading Speed Improvements**

As many of our business partners continue to grow and invite their clients into Moneysoft it was becoming evident that the page loading speed was suffering. To alleviate any time lost to page loading times, we have introduced pagination to the Individual Clients tab in both tile and list view. By default the page loads with 10 clients per page, but this can be changed for the session from the drop down at the bottom of the page.

You can read the full release notes for the Moneysoft PFM software by checking out the [Biznews Hub](#).

Victoria Cougan - Customer Service Specialist

**Creating a Budget in Moneysoft**

Having a budget is an important tool to being able to identify current and future savings capacity, which is a critical input into the goal planning process. While creating a budget can be difficult, Moneysoft makes the process easy by automatically collecting banking transactions from all your accounts and automatically categorising income and expenses.



We have developed a helpful guide to creating a budget in Moneysoft. This guide outlines a process that you can use with clients to quickly and easily create a budget in Moneysoft, including handy tips and important considerations when setting up the budget.

A full copy of the guide can be found [here](#), however a couple of the tips discussed in the article include:

- How to use the Moneysoft “Calculate Budget” feature to automatically create an initial budget for the client (based on current income and expenses). The budget can then be adjusted / refined to align Budgeted Surplus with the client’s stated financial goals.
- Viewing the budget is a promise and a plan that provides a road map for clients to achieve the goal/s they have set for themselves.
- Think of all expenses as either Fixed (can’t be easily changed, e.g. Rent) or Variable (can be easily changed, e.g. Entertainment or changed with a bit of effort, e.g. Utility Bills).
- Using the tools available to help clients track the budget and stay on track such as the Budget vs Actual report which shows you exactly how much has been earned and spent compared to budgeted income and expenses, over any time period. Importantly it will show the areas in which clients have performed better than expected and which areas need some work.

Miles Casbier - Account Manager

If you have not experienced Moneysoft and the benefits it can deliver for your business, click here to set-up a **FREE TRIAL** account.

**TRY NOW - IT'S FREE**