



PRESS RELEASE

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VOYANT LAUNCHES INTELLIGENT FACT-FIND TECHNOLOGY

Financial planning technology specialist **Voyant UK** today announced the launch of its new 'fillable' fact-find technology, which allows seamless transfer of client-specific data from a .PDF file into the *Voyant Adviser* solution.

The new .PDF (Adobe Acrobat) version of the Voyant fact find can be easily and quickly completed by the client or the adviser, including any extra data needed by advisers for compliance purposes. Once advisers receive the completed form from their clients by email or other electronic means, they can import the data entered into the form directly into Voyant without the need for any re-keying. They can also print the completed fact-find form and have their clients sign the document for compliance and retention purposes. Throughout the whole process there is no double entry of data required ensuring maximum accuracy and efficiency as well as producing a solid audit trail.

Bob Freeman, COO of Voyant UK, explains:

"This is another excellent example of listening to our users and acting quickly to develop new applications that help them enhance their overall experience of using Voyant with clients. When we showed the new intelligent fact-find technology to some of our advisers the reaction was one of great excitement and already the feedback in testing has been incredibly positive. Being able to rapidly deploy new technology like this is core to our commitment to stay ahead of the game."

The new Voyant fact-find technology provides a single document for initial client engagement which can also accommodate data items not needed by Voyant Adviser. Whilst the data not used in Voyant is not imported, importantly it is available in the fact find for entry to other systems, giving advisers plenty of flexibility to tailor to their business processes.

Andrew Hart, financial planner, Serenity Financial Planning, explains:

“The new fillable fact-find is comprehensive and captures all the data that is required to create a detailed financial plan. It allows advisers to only enter the data once, freeing up their time to work on more comprehensive financial planning strategies”.

Voyant Adviser provides a collaborative financial planning presentation system, including cashflow, goal planning, estate planning, investment management, risk profiling and capacity for loss. Following rapid growth in the past few years, Voyant's solutions are increasingly being used as the preferred financial planning technology in the mass markets with larger 'enterprise' organisations.

Based on current usage, Voyant estimates that over £750 million of client assets are advised on every month; modelled via the *Voyant Adviser* and *Snapshot* technology solutions.

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About Voyant UK

Voyant is a leading supplier of financial intelligence presentation and collaboration platforms which simplify financial needs assessments and planning processes between advisers and their clients. *Voyant Adviser* has seen unprecedented growth across its UK IFA channel since launch in 2008 and was rated top in the 2011 Money Marketing/F&TRC financial planning tools research, with 39 5-Star ratings.

Over 500 of the UK's most reputable firms rely on Voyant Adviser to develop in depth financial plans and provide piece of mind to their clients.

Voyant UK is a wholly-owned subsidiary of Voyant Inc which is headquartered in Austin, Texas.

To find out more about Voyant, visit www.planwithvoyant.co.uk