



Run the process WORKFLOW

- ✓ Guided workflow, first contact to SoA
- ✓ Advice-process checklist, your steps built in
- ✓ Tasks, reminders and status tracking
- ✓ File notes from your meeting transcription

Capture once, reuse everywhere DATA

- ✓ Fact find by link, or live in the meeting
- ✓ Needs analysis calculator
- ✓ Policy and client data pull (CDM)
- ✓ Before-and-after cover comparison

Ready-made content TEMPLATES

- ✓ Email, engagement and cover letter templates
- ✓ Insurer contacts and underwriting
- ✓ Pre-SoA strategy discussion document
- ✓ All carrying your branding

Document automation EXTRACTION

- ✓ Policy schedules and anniversary notices read in
- ✓ Quotes captured into comparison and SoA
- ✓ Medicals read into the pre-assessment
- ✓ Client strategy snapshot in a minute

Safe and supported TRUST

- ✓ Compliance guardrails built into the flow
- ✓ Support and admin seats included
- ✓ Guided onboarding and ongoing updates
- ✓ A team that knows risk advice

One system, start to finish

Fact find

Client link or live capture, transcript becomes the file note

Needs analysis

Fact find flows through, existing cover auto-populated

Research & quotes

LifeRisk Online quotes and policy schedules read in

Pre-assessment

Medicals read in, insurer contacts already loaded

SoA

Needs, comparison and quotes populate your template

Ongoing service

One-click review, the client record fills the check-up

↑ Drops in automatically. Capture it once, re-key as little as possible.

The rework it takes off your plate

This is where the hours go, and where you get them back.

- ↓ **Less re-keying.** Fact find data flows into the needs calculator, the comparison and the SoA.
- ↓ **Less chasing paperwork.** Clients complete the fact find online, or you capture it live.
- ↓ **Less rebuilding comparisons.** Existing cover and new quotes are pulled in and laid out for you.
- ↓ **Fewer blank pages.** The strategy document and the SoA start already populated.
- ↓ **Less hunting for templates and forms.** Already there, carrying your branding.

Add on when you need it

Plugs straight into what is already there.

- ✦ **RiskAssessor** advanced health and pre-assessment support
- ✦ **Done-for-you SoA production** (pay as you go) we produce it, you sign off
- ✦ **SoA Builder** build SoAs in-house, with our support while your team comes up to speed
- ✦ **Exec Summary** (in beta) a graphical, client-friendly presentation alongside the SoA

How it is priced Per adviser, with support and admin seats included. Modules added when you want them. Your LifeRisk Online and CDM licences stay yours. Guided onboarding, quoted per practice.



And a word on security

- ✓ **Onshore, end to end.** Stored and processed in Sydney. Any AI runs through enterprise, non-trained services, also in Australia.
- ✓ **Secure client links.** Links verify identity and expire.
- ✓ **Your own tenancy.** Each practice has its own, with multi-factor authentication and named logins.
- ✓ **The adviser signs off.** Everything read or drafted is put in front of you to confirm. Edits are logged.

50+

Statements of Advice built through the system, from the straightforward to the genuinely complicated. Vetted and compliance reviewed along the way.

Halved

The time it takes to onboard and prepare a new client.

Under a minute

To produce the snapshot and strategy discussion documents that might otherwise take an hour or more to prepare.

Real advisers, real cases, real results.

Start with the fact find your clients will actually complete.

One simple step, then you're moving. Book a walkthrough, or get in touch for a demo.

[Book a walkthrough](#)

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