



NEW CUSTOMISABLE FACT FIND OFFERS COMPLETE FLEXIBILITY

Durell Software today announced the launch of their new fact find system, available free of charge to all supported users as part of their “Financial Adviser” and “Mortgage Manager” systems.

- Entire layout is customisable (i.e. questions, sequence, totals and style)
- Re-defined layouts are immediately printable
- Fact finds may include coloured logos and pictures
- Durell also offers a layout design service for busy IFAs and networks

Optional extras include:

- Can be displayed both on local system and via the IFA’s website
- Allows clients to enter or amend details directly via the website
- Green initiative to reduce fact finding trips (and increase sales days)
- A secure server and web space are provided within this cost

A ready-made set-up is provided, however the IFA can customise the layout by editing the questions, their order, the headings, totals, fonts, and other stylistic aspects. A preview facility enables the IFA to check the appearance of a new layout. All such new layouts can be printed immediately using exactly the same fonts and colours. The fact-find can be designed to match the existing house style of the IFA’s website, ensuring consistency.

Robert White, Managing Director of Durell Software says:

‘It’s great to be able to give our users something that can increase their selling time while also helping the planet’.

The optional web link facility enables clients to access their details by logging on via their IFA’s website, where they can enter or amend their personal details (in addition to viewing their investment portfolio). Any changes are automatically downloaded to the Durell database. Reducing the number of fact finding visits to customers saves time, and in turn increases the selling days available to the IFA. Furthermore, the IFA can promote their green credentials as they both save paper and eliminate excess travelling.

Tim Ames, Director of Cathedral Financial Management in Exeter comments:

‘We have been users of the Durell system for 15 Years. Their progressive and forwarding thinking approach is clearly demonstrated by this new key feature to the software. Most IFAs do not want their hands tied by a third party when establishing their business model. Durell gives us the flexibility to succeed in the post RDR environment.’

Sharon Nicolson, a user who’s trialled the system says:

‘We’ve seen a number of benefits in using Durell; the system is user friendly, the Support Team are always helpful and any bespoke work required has always been accommodated, with suggestions / improvements being made to the original request.’

The customisable fact find will be available to all supported users from today, and is one of many exciting new developments from Durell Software. Transforming current practice, it offers a quick, smooth and accurate fact find process, providing benefits to both the IFA and their clients.

- ENDS -

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Notes to Editors:

Durell Software provides back office administration software for IFAs and Mortgage Brokers. An entirely FREE copy is available from Durell's website www.durell.co.uk, which also includes PowerPoint demonstrations of the systems. Durell was established in 1983, initially to produce computer games, switching to the IFA market in 1990. Currently around 1000 IFAs use Durell, which includes full accounting to trial balance, financial planners, diaries, messaging, client and policy databases, compliance and performance reporting, an investment portfolio manager with on-line valuations and now a comprehensive flexible fact find system. Durell's web-link is an optional extra.