

# Digital Advice Solutions



# Welcome to IFS' Digital Advice Solutions

For more than 20 years, Industry Fund Services has worked with industry super funds, delivering products and services to support funds deliver to their members.

In that time, we've learned that each fund has its own unique style, member proposition and requirements.

That's why, when we design a new product or build a new service, we are cognisant of the need to ensure that it is flexible and adaptable to the requirements, needs and objectives of your fund.

## No one knows your member better than you do

That has been the guiding principle for the design and build of our Digital Advice Solutions.

IFS' Digital Advice Solutions have been built to acknowledge the fact that every fund will have a different approach to the online engagement of their members.

Our online advice tools are designed to support your strategic objectives, be that deeper member engagement, member education, low-cost delivery of scaled advice on simple topics, or supplementing and supporting your member service and advice channels.

Our Digital Advice Solutions can be tailored to meet your objectives. Our 'pick and pack' delivery strategy allows funds to tailor their approach to fit seamlessly with their own strategy.

**44**

ONLINE  
TOOLS

**10,000**

TRANSACTIONS  
PER MONTH

**5**

MAJOR  
FUNDS

# Ten key benefits of IFS' Digital Advice Solutions

## 1. Three tiers of tools

### ADVICE

---

#### **Single issue digital advice tools producing a fully compliant Statement of Advice for key intrafund topics.**

IFS Advice tools deliver superior quality, fully customisable Statements of Advice. 100 percent compliant and rich in detail, the most effective way of turning an online visitor into an advice client.

### SELF DIRECTED

---

#### **General advice tools providing scenario building and rich member reports.**

Perfectly placed between Foundation and Advice, this range of detailed tools offer a member the ability to learn financial terminology and explore the difference changing their situation now can make later.

Using four key levers — Contributing to super, Investment risk profile, Retirement income goals, and Retirement age — a member can explore what each of these means for them and how they might be able to have the lifestyle they are after.

### FOUNDATION

---

#### **Simple superannuation, savings and budget calculators.**

This is the first stop for the majority of members. A necessity for all websites which can be an instigator for serious lead generations.

Comprising of three super calculators, two budget calculators and three savings tools, these are one click result tools designed to give a member a quick answer with minimal effort.



## 2. Member reports

All Self Directed tools produce an information rich report that outlines:

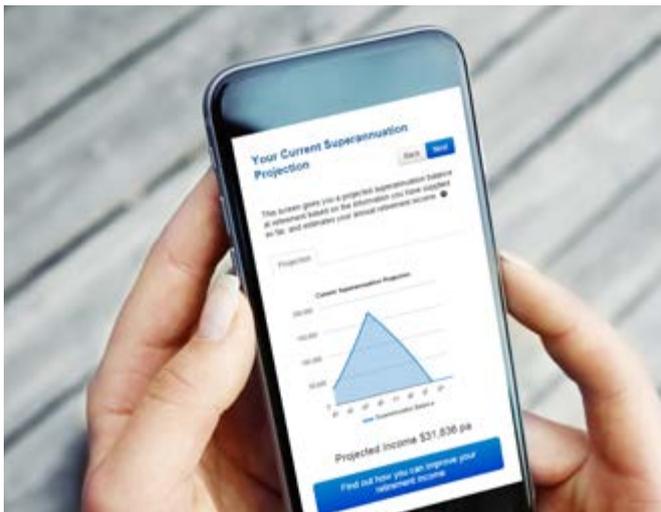
- the inputs from the member
- selected scenarios and potential outcomes
- next steps
- a full list of assumptions.

The IFS platform offers the functionality of sending the report to a designated planner for review — generating lead opportunities for the fund with every report created.



## 4. Member report in XPLAN

Inbuilt functionality sends the member's report directly to XPLAN, where their data is saved under their username as an admin note. If the member ever seeks more tailored financial advice, a planner can access these reports prior to meeting with the client.



## 3. Calculation consistency

The IFS advice tools are configured using the same baseline assumptions and algorithms as XPLAN providing a consistent member experience across all IFS advice platforms. Whether a member is using a Foundation tool, an Advice tool or even receiving advice from a planner, all scenarios will be calculated using consistent parameters.

## 5. Planner and admin consoles

The platform provides a full view of all member registration details allowing funds to:

- reset member passwords
- generate leads
- manage member contacts
- view statistics

## 6. Referral process

Each tool has a contact request feature to allow a member to request assistance at any point. This process attaches to existing fund referral protocols, increasing both reach and lead generation.

## 7. Website embedding

All of the IFS advice tools are designed to integrate seamlessly into any website and to match styling so to a member, there is no abrupt change in surrounding. There is also an option for IFS to house all tools on a separate microsite for funds who don't wish to host the tools themselves.



## 8. Tool suite customisation

The IFS suite of online tools supports extensive customisation:

- colours and branding
- graphs and images
- text font and size
- language
- fund based assumptions and returns.

## 9. Statistics

All calculators integrate fully with Google Analytics to ensure every step a member takes can be captured and counted to optimise the user experience. This allows funds to:

- view user statistics including which tools are used most, click through rates and drop out rates
- view user behaviors to monitor and predict when they are most likely to seek contact
- create reports on which tools are used most.



## 10. Personalised URL campaigns (PURL's) member report in XPLAN

The IFS platform also allows a fund to develop and personalise direct marketing campaigns.

Members can be contacted electronically with targeted messages that are personalised and which direct them to the relevant campaign sites.

# About Industry Fund Services

For over 20 years Industry Fund Services (IFS) has been Australia's leading provider of specialist business solutions and services, financial products, tools and advice to the 'all benefit to member' superannuation sector.

We work with funds to help their members to achieve all of their financial goals — super, retirement and savings objectives.

- Wealth Management including Tailored Advice Solutions and Advice Management Services (IFS Financial Planning)
- Collection of unpaid SG contributions (Industry Funds Credit Control)
- Non super investment options for members (Industry Fund Portfolio Service)
- Unclaimed Super (AUSfund)

# For more information

**Peter Bottomley**  
Executive Manager,  
Communications and Channels  
0428 644 909

**Frank Gayton**  
Executive Manager,  
Strategic Partnerships  
0419 335 171

This document is issued by Industry Fund Services (IFS), ABN 54 007 016 195, AFSL 232514. The information contained in this document is general in nature and has been prepared without taking into account your objectives, financial situation or needs. Before investing in any product you should therefore read the relevant Product Disclosure Statement (PDS) and consider the appropriateness of any investment for your objectives, financial situation or needs.



**INDUSTRY  
FUND  
SERVICES**