

Providing the personalised KiwiSaver advice that clients deserve, at scale...

CASE STUDY

AMICUS

"We are in the midst of a full digital change, we understand the road blocks that advisers face and we needed to find a partner that could help remove these road blocks" Nick Wells is an integral part of the KiwiSaver advice team at Amicus...

Amicus had identified that they had a large client base in the KiwiSaver space and faced the growing challenge of how to engage all these clients and maintain the personalised advice that they deserve, citing it was "almost impossible the old way".

Amicus Group is a large player in the wider Wealthpoint Group, based in Christchurch, Amicus work with clients nationwide in the investment and insurance arenas. Wells saw an opportunity to make fintech work for them in the KiwiSaver area, "after being shown the system by an existing OMNIMax client **we straight away understood that OMNIMax could provide the tools we needed to deliver personalised advice at scale**".

With the OMNIMax KiwiSaver solution a lot of the admin work is taken care of, it allows clients to complete a fact find

Online, then using this information and the readily available data in the system, the adviser can easily analyse goals, compare and recommend any KiwiSaver provider and fund depending on the client's profile and risk appetite determined within the discovery process. "Its easy to compare fund information, OMNIMax are abreast the market, they have the knowledge and are generally doing what we want before we know it."

Wells credits the solution with a big time savings "It's so easy and simple – we're finding it 60-70% faster, the solution gives us the ability to deliver quality personalised advice at scale. The template allows you to create a solution that fits 10,000 people that is still personal while maintaining compliance and meeting regulatory obligations. The solution removed the worry, that feeling like you've missed something. The legal and compliance, privacy and data – all these boxes are ticked, there's a growing spotlight in this area and the system makes sure that nothing is missed, no need to worry and hope you've got everything"

The KiwiSaver Solution is a ready to go or out-of-the-box software package that is designed for quick setup.

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Nick Wells
Financial Adviser - Amicus Group

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"Because it's a boxed product, the solution is getting continual updates as things evolve, we made a couple of suggestions and within weeks they were implemented" Wells comments. "Feedback from our clients has been all really positive, the simplicity – ***it's easy for clients to understand and the words are backed up by data and its also visually appealing.***" Graphed scenarios show client's predictions around how their investment may grow so that their strategy can be amended if required.

Wells sums up "we feel automation and digitalisation of process and workflow gives us a greater ability to give our clients the personalised advice and service they all deserve. This industry is ever evolving and our clients are at the forefront of everything we do, OMNIMax provides us

the tools to position our offering to be ahead of the curve.

When we first met with the OMNIMax team they were so approachable, we underestimated the knowledge they had, we thought they were just developers but quickly came to realise they understood the industry and understood what we needed, nothing we asked for came as a surprise to them and so we had the faith to move into the investment area as well. We'd eventually like to move all our advice workflows to the system.

OMNIMax are a great asset to our business, and we are lucky to partner with them. We have full confidence in what they are doing and the solution costs nothing really, it more that pays for itself.

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