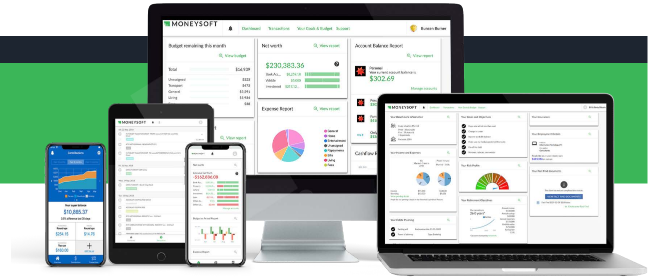
MONEYSOFT

NOVEMBER EDITION 2020

*e*NEWS MONTHLY



CEO Update

Digital Advice is Getting Real

With our Xplan integrations bedded down, next off the rank is Midwinter. We're super excited about this one as it offers true potential for our customers to implement a fully digitised advice service. Midwinter has some excellent features to support digitisation of advice, such as the multi-goal modeling, and when coupled with Moneysoft's state-of-the-art Auto Fact Find and client portal, it really does meet the ideal for efficient, automated financial planning and advice.

We expect to have this integration close to completion within the next four to six weeks, so keep your eyes and ears peeled for further announcements via email, Facebook and LinkedIn - be sure also to follow us on Facebook and LinkedIn if you don't already!

Yodlee Upgrade

The Yodlee upgrade has entered final Acceptance Testing internally and we expect this to complete within the next two weeks. After that we move into Pre-production testing (to make sure the upgrade and merge of Fact Find doesn't break your operating environments) before the full roll-out to the Production systems (that's when you all get your hands on it).

We have decided to run the legacy Yodlee environment until 31 March next year, pending approval from Yodlee, so that you'll have a reasonable amount of time to work through your clients and ensure they have upgraded.

It should be a pretty simple process with the upgrade wizard, but we do recognise that Christmas is coming and there will be some client contact required to get the upgrades completed. There will be a full direct email communication just prior to go-live. Expect that in the next two to three weeks time.

There's some excellent material in this months' issue so please keep reading on. For any of you who missed our fantastically successful Fact Find Webinar, there's a link to the recording available in that section of the eNewletter. In addition, we've created some brilliant new tutorial videos that you can share with your clients to make life even easier.

Jon Shaw - CEO

New Client Tutorial Videos

While we continue to make improvements and enhancements to the Moneysoft software, we also understand this needs to be supported by the relevant business support materials, including process guides, marketing collateral and general resources, to assist you in delivering a robust and seamless technologically driven service offering to your clients.

Therefore, over the coming months we will be updating our existing business resources to ensure they remain relevant and current, as well as creating any new marketing or support material that we believe will add value to your process.

We have started with an update of the following client tutorial videos:

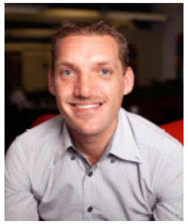
- Moneysoft Tutorial - Categorisation Transactions Pt 1
  Categorise financial transactions including reconciling transfers
- Moneysoft Tutorial - Categorisation Transactions Pt 2
  Categorising transactions by creating rules
- Moneysoft Tutorial - How to create a budget
  This video explains how to create a budget in Moneysoft
- Moneysoft Tutorial - Tracking Goals
  This video shows how to set and track goals within Moneysoft.

The client tutorial videos can be provided to clients for them to refer to as they set-up their own accounts. We will continue to improve on and add to the resources available and keep you updated as new offerings are made available.

Miles Casbier - Account Manager

1300 580 878

Midwinter / AdviserLogic Integration



Development of the Midwinter CRM integration has started and will be followed by AdviserLogic in 2021.

Now that the long awaited, exciting and game-changing Moneysoft to Xplan two-way data feed CRM integration is complete, we have completed four months of work with the Midwinter team to finalise the analysis and scope of the Moneysoft and Midwinter Integration.

With the integration rubber now hitting the road and the coders are coding, it won't be too long before we start inviting our customers to be part of an exclusive pre-release test and pilot program. As part of this program, we will be asking you to utilise, verify and report back any issues with the integration and data feed – and yes, you can also let us know your enhancement suggestions too.

If you would like to be part of the pre-release test and pilot program, please send an email to sales@moneysoft.com.au with the subject Midwinter Integration along with the following information:

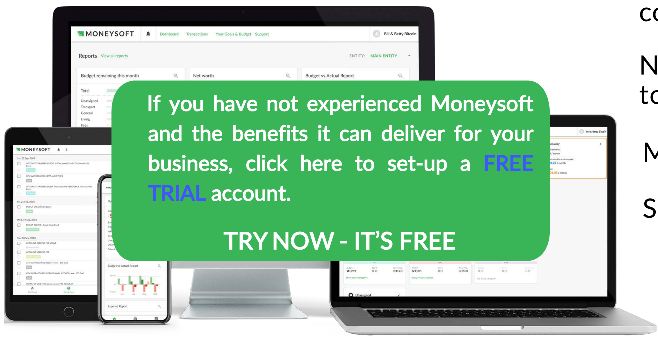
- Business name
- Licensee / dealer group
- Name
- Contact number

Note: To be eligible to participate in this program you must be an active user of both Midwinter and Moneysoft portals at the time the testing is to be conducted (start date to be confirmed).

Depending on the the level of interest, we may not be able to accept all applications. All applicants will be contacted directly to provide further information closer to the program start date.

Peter Malekas

Moneysoft Director and Founder



Moneysoft Fact Find Webinar - Recap

We had a fantastic turn out for our first Digital Fact Find Webinar last week, with approximately 100 people tuning in.

The webinar centred around how the traditional Fact Find process can be digitised and customised to your business' own requirements and the data integrated into Xplan.

In addition to the value in time, cost and overall efficiency benefits, one of the key takeaways is the improved client engagement prospects during the initial experience and on an ongoing basis.

The audience was able to see that when the digital Fact Find is also paired with our traditional PFM products, Moneysoft provides the client with a powerful tool to help with their cash flow, goal setting and budgeting needs while also giving the adviser simple and straight forward way to collect and store valuable client data.

There was a lot of interaction during the webinar with a number of questions asked and answered as we moved through the presentation.

The webinar was attended by a diverse group of existing Moneysoft clients (Financial Advisors / Mortgage Brokers / Money Coaches) looking to better understand the value offered by the Digital Fact Find and how it fit into our existing product suite, as well those who have are considering Moneysoft as a new tool for there arsenal and some who were completely new to the Moneysoft experience.

We have been flat out in the subsequent days, fielding plenty of follow up questions and those jumping on a free trial to experience all that Moneysoft has to offer.

For a full recording of the webinar click here and for a look at the Q&A from the session, please click here. If you would like to know more or take up a trial please contact the team on sales@moneysoft.com.au

Note that later this month we will be hosting another webinar discussing how best to extract the value from Moneysoft and integrate into your business....

More details to follow in the coming weeks.

Steve Davis - Head of Sales