

**Content &  
communications to  
educate & engage.**

**Financial Knowledge Centre**

[iress.com/financial-knowledge-centre](https://iress.com/financial-knowledge-centre)



# Tell me how it will help me

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Regular communication with your clients is important, however, this means you need to find or create new and interesting content to deliver them—which can often be time-consuming and difficult to source.

Financial Knowledge Centre provides you with effective and relevant content for client communication; delivering you new monthly content and an eNewsletter template to send out to your clients. This innovative and easy to implement resource is customisable to your brand, social media friendly, and allows you to engage and educate your clients, prospects and centres of influence.

# Tell me what it actually does

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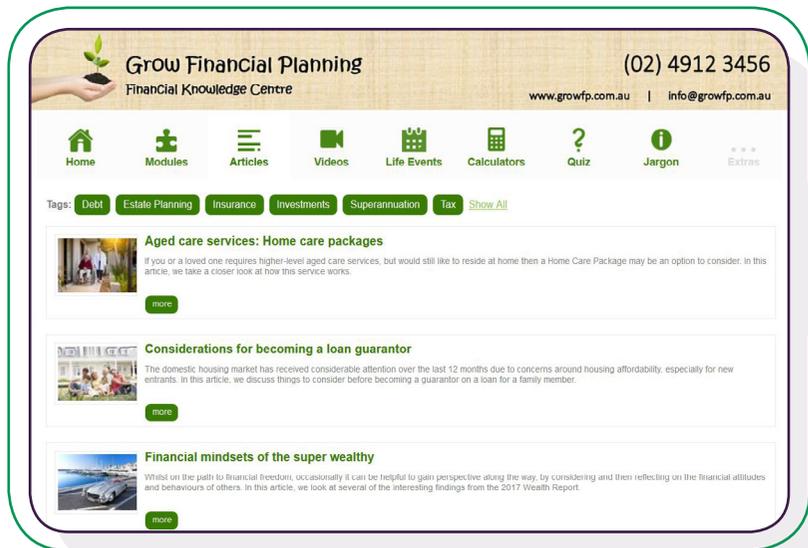
Financial Knowledge Centre is a cost-effective, online resource with an impressively large catalogue of financial and life stage content designed for existing and prospective clients of financial planning practices. The resource comprises of learning modules, articles, videos, quizzes, life event materials, calculators and jargon busters.



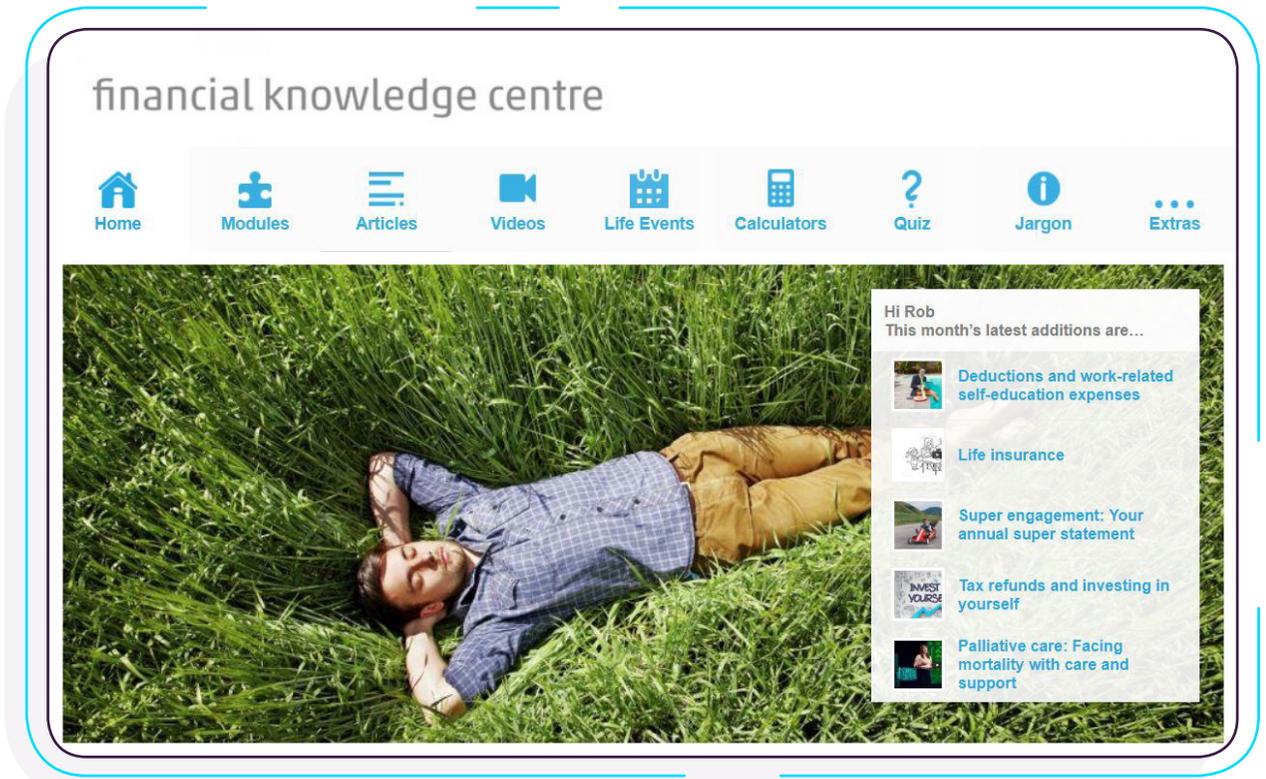
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One of the benefits of using Financial Knowledge Centre is the terrific library of articles and information. Using this resource saves our practice around a day a month in preparing marketing material and provides our clients with interesting and relevant information. The savings made go straight to our bottom line and frees up resources to provide more valuable services to our clients.”

### Story Wealth Management



Financial Knowledge Centre articles list provides you with control, it uses tags and is searchable.

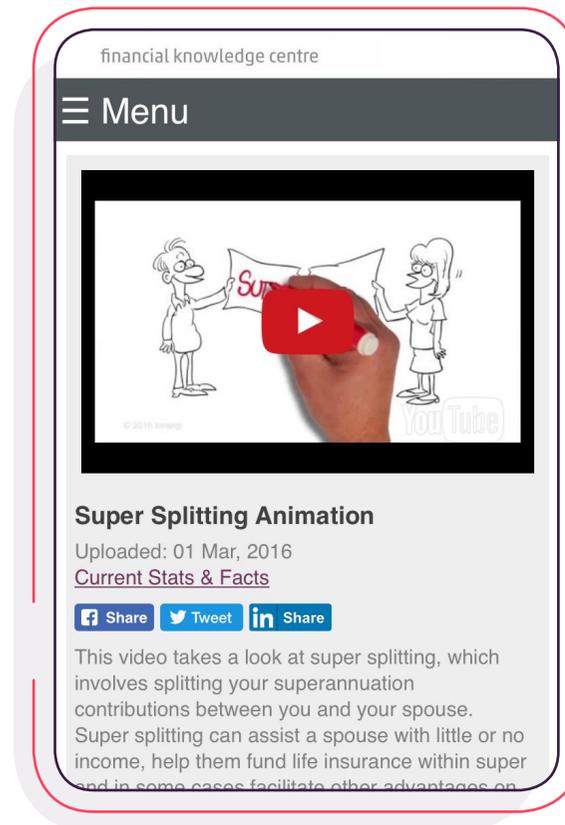


Financial Knowledge Centre homepage allows you a fully branded page including images and your corporate colours.



# Can you break it down for me?

Mobile access includes video viewing.



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## Your own branded content resource

Expand your service offer and keep your business front of mind with your own customisable and branded Financial Knowledge Centre and a monthly eNewsletter.

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## Fresh & flexible content every month

Stay in touch with your clients—deliver them fresh digital content every month while retaining flexibility and control of what they see. You can also add your own content into the mix.

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## Easy access

Integrate the resource quickly and easily into your business and through your social media channels, with multi-device access for your clients 24/7.

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## Analytics

Track the success of your monthly eNewsletter campaigns with data on open and click rates.

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## Modules & Tools

Comprehensive learning modules, quizzes and financial calculators.

# Give me five reasons why I should use it

1

## Client-centric

A customisable and branded digital resource.

2

## Access anytime

Multi-device enabled, accessible 24/7.

3

## Relevant content

A wide range of financial and life stage articles and videos.

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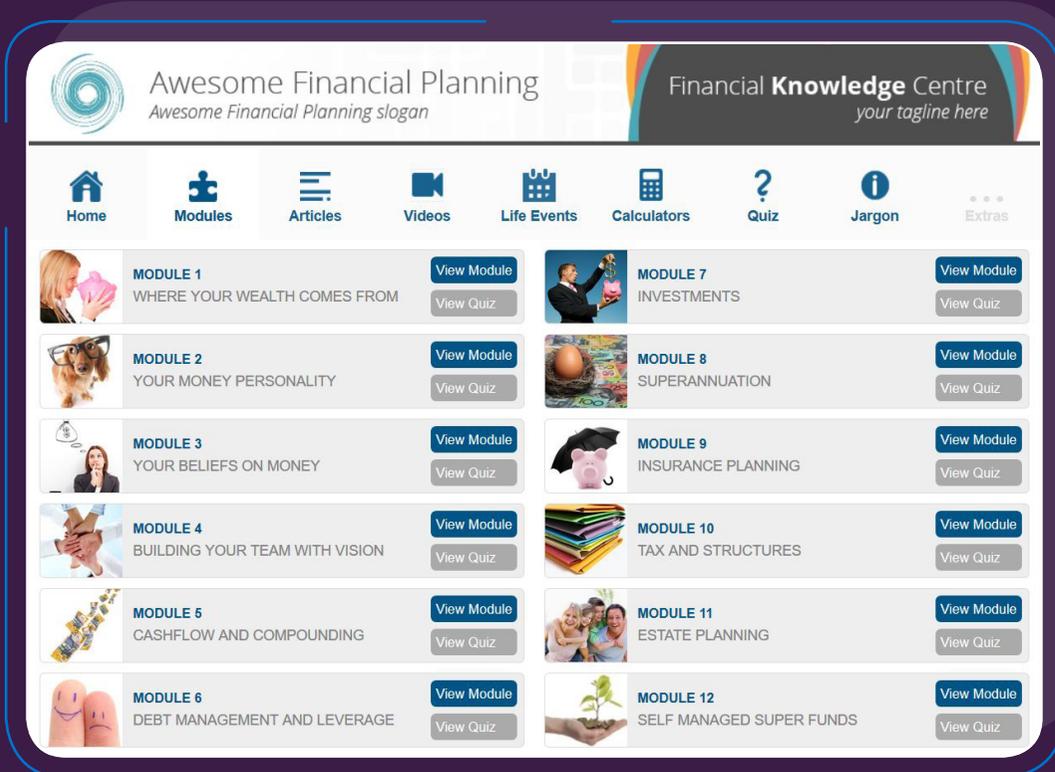
## Cost & time efficient

Freedom to take a hands-on or off approach.

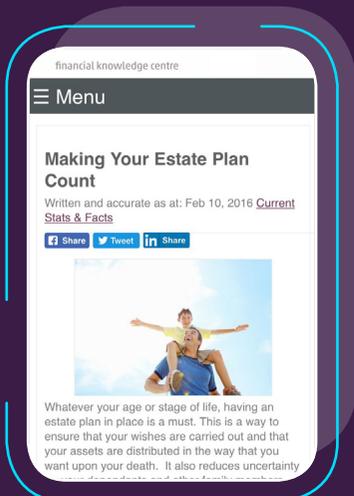
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## Client Engagement

Stay in touch with clients and prospects with ease.



Financial Knowledge Centre learning module section, for those wanting to deep dive or reference in-tactical content.



Mobile access includes article viewing.

## What about service and support?

We understand providing great service and support goes hand-in-hand with delivering great software.

We pride ourselves on our thorough and timely implementations, reliable and scalable hosting services, robust back-up and recovery procedures, and ISO/IEC certified information security management.

Our expert-led support team, training programs and online user community all help our users get the most out of our software.

## How does Iress stack up as a technology partner?

Every day, more than 9,000 financial services businesses use our software to make better decisions and deliver better results. We know they don't just expect software that works, they also want a technology partner that works with them.

Leveraging our industry knowledge and global experience working with clients just like you, we design, develop and deliver creative, reliable software that does what you need it to.

At Iress, we believe technology should help people perform better every day.



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