



AdviceOS

by Midwinter

Brilliantly simple advice technology.

AdviceOS is a comprehensive financial planning solution built for humans – humans who provide advice, and humans who rely on advice to make smart financial decisions.

A cloud-based financial advice software solution, AdviceOS was built for every financial advice business – from small practices to large institutions.

It's easy to implement into your practice and Midwinter looks after all of the software updates and management, so there are no IT hassles or hidden costs.

Take your practice into the digital age with an AdviceTech solution built for the future.



Reach new customers to grow your practice.



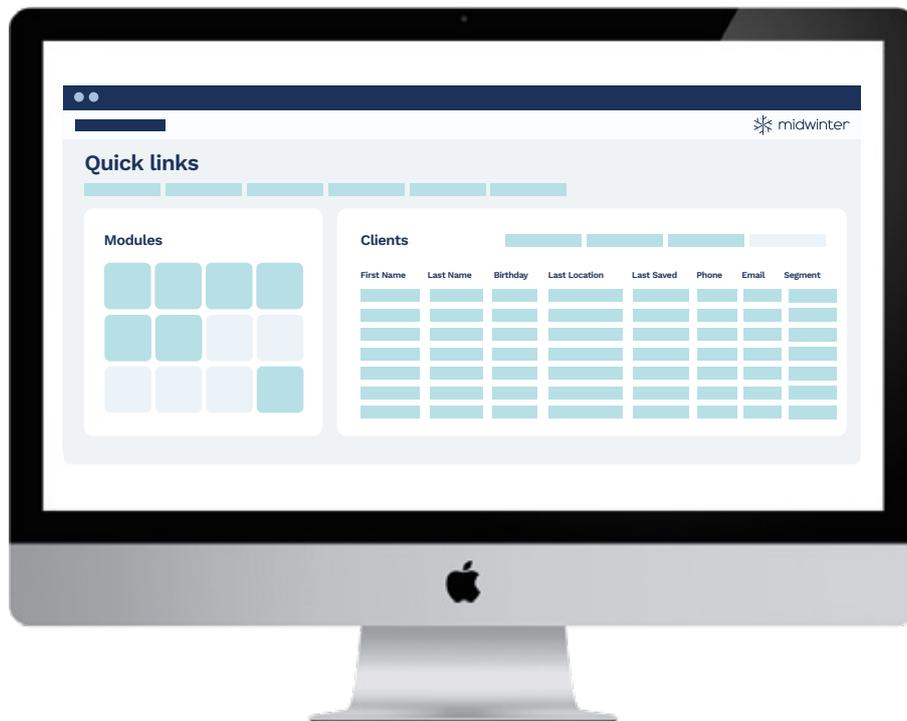
Create new ways to collaborate with clients.



Provide sophisticated and compliant advice.



Gain control and visibility.



Everything You Need to Provide Great Advice

CRM

The comprehensive CRM provides everything you need to track and manage client relationships, do advice specific reporting and manage your compliance obligations, such as FDS.

Product

Analyse client needs, compare products and determine the optimal portfolio for your client while also meeting your best interests duty.

Insurance

Analyse client needs, compare insurance and determine the best insurance product for your client while also meeting your best interests duty.

Strategy

Comprehensive modelling tools for transitions, contribution, retirement and advice strategy generation.

MultiGoal Advice

Evaluate multi-goal scenarios in real time and create a comprehensive goal map for your clients in a single meeting.

Aged Care

Support clients who are making sensitive and difficult decisions with financial advice around home ownership, asset structuring and cash flow management.

Key Risk Indicator Solution (KRIS)

Create alerts based on indicators of possible issues, monitor these on a daily or real-time basis and quickly address any potential breaches from your customised dashboard.

Client Portal

The digital client portal provides a comprehensive fact find, objectives builder and document sharing to keep your clients informed and engaged in between meetings.

Data Feeds

Midwinter utilise data feeds from InvestmentLink, an independent data repository in Australia with 600 feeds to fully service all sectors of the financial market.

GROW YOUR PRACTICE & PROFITS



Provide Advice

AdviceOS provides everything you need to deliver great advice in a fraction of the time of traditional and manual methods.

Use your expertise to provide insights and advice to your clients and leave the cumbersome research, number crunching and reporting tasks to **AdviceOS**.



Manage Clients

The extensive **CRM** capabilities in **AdviceOS** ensure you can easily track, find and report on client activity.

Integrated client-facing digital tools provide new ways to connect with your clients, creating opportunities to scale your client base and grow your practice.



Stay Compliant

AdviceOS makes it easy to meet your best interests duty and compliance obligations with tools throughout the software that provide transparency, monitoring and reporting.

About Midwinter

At Midwinter, we know there's a human interaction behind every quality advice experience.

That's why we're focused on supporting you, with software that simplifies how you deliver advice. From managing compliance to scaling your practice, our software solutions support your everyday tasks so you can focus on providing great advice and growing your business.

Over the past few years, the Midwinter team has worked closely with clients both big and small to build the best advice solutions on the market.

Midwinter's digital advice framework seamlessly interacts with our flagship AdviceOS platform, enabling advisers to deliver quality advice at a lower cost and greater scale, and providing a new way for advisers to engage with their clients.

Our solutions meet the evolving needs of the advice industry, its consumers and the humans who provide financial advice.



Get in Touch Today

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