

AT8 InfoBlog – Plum Software

Company Overview

Plum Software Limited is an independent specialist software house for financial advisers and mortgage brokers providing solutions for the front and back office. Plum was established in 1993 by Ann Dempster and David Felix-Davies who still lead the company today. Plum has installed the software in over 2000 firms with over 7,000 individuals to manage their personal and business clients.

Plum works closely with the industry Standards bodies, including Origo and is proud of its use of the various industry standards. Plum are easy to do business with and have a strong reputation for the integration work they have done with third parties such as product providers and other software houses.

Plum targets the mid-tier to smaller IFA (sub 50 advisers).

Solution Overview

Plum has recently undergone a complete rewrite to bring its technology base up to date. The resulting system is a professional looking client management solution for IFAs and Mortgage brokers. Among the features covered by the solution are:

- Contact management
- Factfind
- Financial Calculators
- Client and Business Reports
- Integration to third party quote and apply services
- Document management
- Contract Enquiry
- Commission Reconciliation
- Workflow Management
- Centralised Diary
- Data Viewers, Graphics

Plum will also host the solution for clients or provide the necessary hardware for clients to manage their own infrastructure if preferred. If Plum hosts the solution, no additional charge is made for data storage.

Plum can run as a thick client implementation or operate in the online world via terminal services.

Plum has many external integrations including: Defaqto, Assureweb and Exweb and most product providers.

Solution Strengths

Experience in supporting the smaller IFAs

Cost effective solution

Good breadth of functionality

Key Clients

Tilney Private Wealth Management

City Financial Planning Ltd

LRH Wealth Management

P Q R Financial Planning

First Class Financial

Solution 'Sweet Spots'

Firms with sub 50 users

IFAs or Brokers not ready for a full SaaS solution but wanting someone to manage their hardware

Distributors looking for a medium priced solution with low cost of ownership

Important Notes

The AT8 InfoBlogs are designed to give a brief précis of the key technology suppliers to the distributors of financial services. They are designed to be used to gain a quick background on companies and their solutions prior to starting on any IT review of supplier procurement. They contain information available publicly on the suppliers and opinion formed from AT8's experience in dealing with the leading companies in the market. We make every effort to ensure the information is accurate at time of publishing but the information is dynamic and should be confirmed prior to any formal decision being made using this data.

The InfoBlogs are a start point that can help in short listing or simply ensuring any contact with these suppliers can start from an informed position. If further opinion or information about each supplier is needed AT8 has a wealth of additional information and would be happy to discuss this on a one to one basis. AT8 also has a clear and fast methodology for procurements and would welcome the opportunity to discuss this with clients as well.

If you would like to discuss this InfoBlog further or would find value in an InfoBlog on a supplier not currently published then please contact us at marketing@at8-group.com or telephone 0121 314 2504.

About AT8 Group

AT8 Group is an innovative consultancy company with knowledge, skill and experience across a broad range of Financial Services and IT related disciplines.

Our experience of working with providers, intermediaries, lenders and IT companies puts us in a strong position of understanding needs and opportunities. Our skills allow us to use our knowledge along with our ability to innovate and proactively to create and implement differentiated business improvement propositions that add tangible value to our financial services' clients and partners. In addition, we supplement our own knowledge with current market data from research agencies such as Datamonitor with whom we have a strong relationship and access to their Financial Services Knowledge Centre.

Specific areas of expertise for AT8 include

- Ecommerce Strategies
- Point of sale and Back-Office solutions, including portals
- Procurement and negotiation
- Sales and Marketing strategies
- Financial services Regulation
- International market analysis

AT8 can support and add value to the full lifecycle of a project from the initial idea generation to operating the project and eventually reviewing and renewing the project.



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