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Press Cuttings

Client: Omnii Solutions
Publication: MyIntroducer (web)
Date: 27.07.11

Omnii Solutions launches new client credit file tool

Wednesday, July 27, 2011

Published by MILLIE DYSON

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Omnii Solutions has launched a new product to help IFAs and brokers access client credit files.

The product, Client Request, allows financial advisers to acquire a client credit file without their client being present. Currently, brokers using their core system CheckITTM can only access a client's credit file while the client is physically present during an advisory meeting.

Simon Baker, the Head of Sales at Omnii Solutions, said:

"Client Request is perfect for advisers who provide telephone or web-based advice. It allows them to use our CheckITTM service - but doesn't require the client to be present to do so. From that point of view, it's revolutionary."

Advisers can enter their client's name and email address into Client Request which then sends a request to their client to order their credit file outside of an advisory meeting.

Client Request then directs the client to a customer facing view of Omnii Solutions' CheckITTM service, and guides them through the process of ordering their credit file.

Not only does the client receive a copy but, simultaneously, the adviser also receives a mirror image of the credit file to review - along with a customised report that highlights key information within the file. The credit data is provided by Equifax.

Simon Baker said:

"Client Request allows advisers to gain a full understanding of their clients' credit position by reviewing the client credit file and their financial status before they have even met with the client. It will save advisers time and deliver them important information that will enhance their business processes."

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