

Pitcher Partners is one of Australia's leading associations of full service accounting, auditing and advisory firms. Their clients include major corporations, large private businesses, family groups, government entities, professional services firms, small to medium enterprises and high net worth individuals.

Business Challenge

Pitcher Partner's investment advisory division were finding it was sometimes taking up to half an hour a day to complete product disclosure statements and application forms on behalf of their wealth management clients. When multiple investments were being developed for their clients, they often had to duplicate personal information many times onto application forms, which could sometimes result in errors in the double handling process. If there were inaccuracies in filling in the form, the application form may have needed to be manually redone, wasting a lot of valuable financial advisors time.

It was a tedious exercise and they believed their time was better spent advising their client base, rather than wasting time unnecessarily on paperwork. Pitcher Partners were looking for a solution to work more efficiently and to quickly process forms for their clients.

Our Solution

Affirm Software's Revolve was installed in 2008 into their wealth management division and their existing forms uploaded to the system. The system was also integrated with their CRM system to enable their financial planners to easily and accurately populate forms online with client data.

Affirm Software continues to develop their system and provides ongoing support to the division, uploading forms as required. Other opportunities are being considered to see if further benefits can be achieved.



"Affirm Software have demonstrated that they can integrate with in-house and ASP systems to pre-populate forms. The potential for time savings is significant."

Geoff Gray, Director of Business and Compliance, Pitcher Partners Investment Services Pty Ltd

Products & Services

Scanning & Document Creation
Revolve™
CRM Integration

Key client benefits

Pitcher Partners Investment Services have seen potential for significant time savings, and a reduction in errors in filling in and updating documents.

Key benefits include:

- Saves administration staff time by auto filling in forms online
- Reduces error rates in completing application forms
- Enables all staff to access a centralised repository of up to date forms
- Standardises the completion of forms and documents

Outcomes

Pitcher Partners Investment Services are now looking at ways to use the software in other areas of the business and improve business efficiencies from a document automation and management perspective.

If you would like further information about any of our products, services or other case studies, please contact us on any of the information below.



Tel +61 3 9029 2907
Fax +61 3 9670 3603
info@affirmsoftware.com.au

Suite 4.15, 343 Little Collins Street
Melbourne Victoria 3000 Australia
www.affirmsoftware.com.au