



For immediate release: Monday, 13 June 2022

**ADVISERSTREAM, CONQUEST PLANNING, INTELLIFLO AND INTERGEN DATA
WINS BEST IN SHOW AT FTRC'S EMPOWERING ADVICE THROUGH TECHNOLOGY (EAT2022)
CONFERENCE**

Following the [Financial Technology Research Centre's](#) (FTRC) annual [Empowering Advice through Technology](#) conference, in the association with the Personal Finance Society, which took place on Thursday 26th May 2022, the following four companies were voted as the Best in Show* by the advisers who attended the event.

- **AdvisorStream: Automated Digital Client Communication and Content Marketing**
- **Conquest Planning Inc.: Strategic Advice Manager**
- **Intelliflo: Intelliflo Planning**
- **InterGen Data: DAVID Digital Advice via Demographics**

Designed to assist advisers in implementing technology in their businesses, the conference was structured to help firms understand the issues they need to consider when choosing technology, such as validating if they have the right technology in their business, understanding how emerging technology can enhance the experience they give customers, and the best approach to sourcing and implementing the technology that best meets their needs.

Ian McKenna, director and founder of [Financial Technology Research Centre](#), commented: "Our annual [Empowering Advice through Technology](#) conference is a different type of event in the sense that it also a masterclass in the key issues advisers should consider when deciding how best to use technology. Our overall aim on hosting this annual conference is to help firms understand how new technologies can help their business, as well as hear from other advisers who are already reaping the benefits.

"This was our third annual conference, and we are delighted it was such a success, with companies across various industries using the event to launch new and innovative technology services because they know the calibre of those who attend are the exact people they want to get in front of. They are serious about embracing change, efficiency and getting the most out of technology for their business – something which we very much welcome."

ENDS

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Notes to Editors

* Companies voted Best in Show:

- **AdvisorStream – Automated Digital Client Communication and Content Marketing**

AdvisorStream is the highest-rated Adviser marketing platform that helps drive growth and engagement through highly engaging communications that spark action.

Get better results from your marketing with a complete solution that includes content licensed from the world's biggest publishers, including the Financial Times, The Guardian, The Independent, BBC, The Economist, Money Mail, The Wall Street Journal, Barron's, Bloomberg, Forbes and many others.

- **Conquest Planning Inc. – Strategic Advice Manager**

The ethos of Conquest is to empower Financial Planners to provide access to financial advice for more people by enabling advisers with next generation financial planning software.

SAM (Strategic Advice Manager) is an AI-expert system that will simplify the advice process. Removing the trial & error style of building financial plans and assisting the user towards the best financial outcomes for the client.

- **Intelliflo – Intelliflo planning**

Intelliflo provides a broad range of solutions to power the advisory experience, enabling financial advisers to help individuals manage their finances, create detailed plans and forecast future financial scenarios.

With intelliflo planning – a new, powerful cashflow modelling solution – you can build, stress-test and adapt client plans with minimal effort and maximum impact. Transform meetings, uncover new revenue opportunities, boost efficiency, strengthen client relationships and minimise the compliance burden.

- **InterGen Data – DAVID – Digital Advice via Demographics**

InterGen Data, utilizes its patent-pending Life Stage Life Event algorithms to provide predictive data and analysis about when important life events are likely to occur, what those events could be, and how much they might impact one's financial journey.

In turn, this results in contextually relevant advice that can be micro tailored to each person in as little as thirty seconds.

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About [Financial Technology Research Centre](#)

The Financial Technology Research Centre (FTRC) as established in 1995, long before FinTech became part of the Lexicon. The firm launched as a boutique consultancy focusing on the potential for technology to improve financial advice for the benefit of advisers and consumers and still addresses areas.

In recent years the firm has established a number of additional business units that provide services into key areas of the financial services market. We also regularly support due diligence on mergers and acquisitions in relevant markets.

LifeSearch Protection Leader of the Year Award 2021 [Adam Higgs], LifeSearch Protection Leader of the Year Award 2022 [Ian McKenna]