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Former planner taps need for online education

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A former Securitor financial planner has started a new online financial planning educational website service that - barely three months since going live with their new Financial Knowledge Centre - has already caught the interest of various dealer groups and super funds.

Over recent years, there has been an opening in the market for an interactive website that would allow users to be more involved in their financial planning and explain the details of their own finances in an easy-to-understand format.

This has prompted a former financial planner to start a new business called 'innergi', a website format service that provides user-friendly financial assistance that can be customised and white-labelled to a financial planner group's own style and services.

"innergi assists individuals in relation to money, their money beliefs and their preferences as to how they build and manage their wealth," stated Robert Skinner, director and co-founder of innergi.

The financial knowledge centre is a customised interactive website created by innergi designed for the planner's clients, both current and potential.

Launched in May this year, Skinner said there are already key deals in the pipeline.

"We feel it is a good time, when planners maybe refining their packages or articulating what they do for clients in a fee-for-service world. We have some early adopters on board now with a further group of planning firms/dealer groups that we are finalising agreements with and we are about to go live with two industry super funds."

The innergi system is marketed to financial planners in a variety of ways, with a principle aspect being that it can provide access outside of business hours, thus increasing the level of client contact and satisfaction.

This can be a significant point of difference between financial planners, said Skinner.

"I think it's the planner's role to be the educator, not the product. I want the knowledge base to be the extension of the planner and their advice, not to replace their role," he added.

Elise Burgess

This story was found at: <http://www.financialstandard.com.au/news/view/29558>

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