Fusion Wealth Top Tips

Our experts share some of their favourite tips to help you get more from Fusion Wealth Platform

1

Paperless Applications
Most applications can now be completed electronically which is quicker for both you and your clients and also great for the environment. It also allows you to save an application without losing any of the data that has already been inputted - a great benefit if you need to gather further information before submitting to Fusion.

2

Auto ISA subscriptions
Being able to automatically fund an ISA from a client's GIA account saves you from having to manually key an ISA subscription for the client each year. Take advantage of the automatic schedular to ensure clients subscribe each year.

3

Integrated client portal
Fusion is fully integrated with Wealth Platform, which gives clients the opportunity to view their investments with a simple to use view. They can update their profile at any time to get a complete picture of their wealth. It can also act as a tool to send and receive documentation securely between adviser and client.

4

Seamless CRM and Platform integration between Fusion and Enable
No more double keying!! Entering information in one system automatically filters through to the other and gives you integrated transaction data between the two systems.

5

Over 100 guides, visual aids, and training content
There are many guides and processes to help you with all aspects of the system, available 24/7 in the Fusion Helpdesk.

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