



Everyone deserves a hero



Patented
cloud base
wealth advice CRM

Everyone can be one

Welcome to Hero cloud based wealth advice CRM.

hero
cloud based wealth

We believe that the wealth management industry will greatly benefit from our well executed strategy around automation of financial advice tools and our expertise in data flow.

Everyone can be one

Introducing the pinnacle in designed
for those seeking to
engage with their clients.

hero
the future starts with you

Everyone can be one

We live in a world of analytical data, every actions we make, every internet site, mobile phone call, how you spend your money, personal actives and even where you go for a walk is being captured, handled and transmitted into a database of future outcomes- all designed for future predictability- it is known as Big Data.

Hero is the world of Big Data.



Hero believes data should be like water.

When you pour water in a cup, it becomes the cup.

When you pour water in a bottle, it becomes the bottle.

When you pour water in a teapot, it becomes the teapot.

When you enter data in Hero, it becomes the advice.

Hero shapes advice.

Advice starts shapeless, formless, like water.

Advice takes shape when it understands the outcome

When Advice becomes the outcome

Hero brings the Advice as one with the client

Hero designed 24 Hybrid advice apps

covering everything from

Cash Flow to Estate Planning

Budgets to Stock selection

SMSF to Portfolio reporting

Single Investment to investing in a Trust

Client Webinars

Online Meeting Rooms

Hero reinvented
the humble Fact Finder.

Analyse client information
whilst the information is being entered.
The data flows just like water into every app.

Hero offers amazing client aspects

Intuitive design layout

Point of Advice display capabilities

Live data graphical display

Social Media interactions

Peer to Peer review

Interactive Client Personal Budgeting model

Inbuilt Outcome based alert notification.

Hero offers communication tools that enhance the client engagement process.

Built in Video conferencing

Messenger

translator

voice mail

SMS

Email

Chat

Hero outcome base communication tools
enhances the client engagement process via our
PAM Technology

Adviser controlled
Outcome focus
Client Engaged

Hero Risk Profile tool

Our patented
active risk profile analyst tool for the industry
designed to
increase adviser trust via transparency
increase advice trust via suitability
increase adviser trust via reportability

Hero client cash management app.
automated bank data driving client results.



Hero personal risk insurance app.

Dynamic client financial position
offering Real Time point of claim positioning &
Real-time needs base calculations

Hero-liSM

Cover todays risk without risking tomorrows retirement
Manage the effects of insurance inside of super

Hero Superfund accumulation app
inflow management
Off Platform and On Platform management
Within Super and Outside of Super Goal management
Client Asset Percentage proportioning
Income longevity
SMSF creation
SMSF Portfolio reporting

Hero Investment & Portfolio reporting app
Manage and monitor both on platform and off platform investments
Single Click Instant detailed Portfolio Reporting
Model portfolio creation and monitoring
37,000 investments
ASX & Managed funds
AFSL APL Grouping

Everyone can be one

Hero ongoing partnership with Microsoft brings the power of Office365 into the world of Wealth Advice CRM

Use Word, Xcel, PowerPoint and OneNote to bring your Practice to a new level

Access client data from any device

Record, write, scribe and sent direct to client files

Everyone can be one

Hero compliance manager
SmartCheck

automated realtime ongoing file compliance
monitoring, management & reporting.

Hero has challenged the way SOA's are created.
We pushed the design envelope to create a
More streamline
More productive
More Compliant
and faster way of authoring an SOA.

Hero QuickTEXT™ & QuickTEXTstrategy™
over 500 customised strategy text options

Instant Adviser creation option

Share & create option

Compliance drive

a breakthrough in design in customised SOA writing.

Hero WorkPOOling™.
Customised Workflow
Single Click task implementation
Track and report capabilities
Task Overdue management
Multi Process driven outcome

Hero Oneclick™
Every action
File note
File sharing
Communication
data update
position updates
All achieved with one single click

Hero 2020
open your advice to the world
Direct client access, interaction and reporting
Ease of use design
Introducing WYSIWYN
What You See Is What You Need
Its all designed to enhance the client engagement
all under the control of the adviser

Hero Compliance

Instant views of who what when and why

Practice Actions, FuM, Inforce Ins, Provider segmentation
client files, adviser files, staff files and compliance results.

All online and all designed for remote auditing

Who is behind Hero software?

Hero is a consortium of Australian Private data company's combining
20 years direct data management experience

Historically the backroom data developers
for some of Australia's class leading & well-known technologies

7 years continuous development of the Hero platform

2 Awarded Design Patents

2 year development pipeline of future enhancements
over 8 million invested in R&D to date

Due for release Mid 2017

Hero software

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efficiency



hero™

Ultimate Advice Software