



Everyone deserves a hero

Patented
cloud base
wealth advice CRM

Everyone can be one

Welcome to Hero cloud based wealth advice CRM.

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.

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

Everyone can be one

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 today's risk without risking tomorrow's 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

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Ultimate Advice Software

