

Coin Software launches comprehensive SOA template

18 February 2010 | by Angela Faherty



Coin Software has launched a new comprehensive Statement of Advice (SOA) template to help financial advisers consolidate the data-gathering process and create greater efficiencies in the workplace.

The move comes after it was revealed in an **Investment Trends** Planner Technology survey in September 2009 that 54 per cent of financial planners cited merging data from different sources to produce SOAs as one of the biggest challenges they currently face in the industry.



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The development is part of the firm's Coin Office v3.4 system and will allow advisers to provide advice about a wider range of strategies such as super and non-super, insurance, Centrelink and estate planning recommendations for both self-managed super funds (SMSFs) and individual clients.

Further features include the automatic population of key sections of the template and the inclusion of current tax and Centrelink rules and thresholds. The software can also be tailored to meet the needs of each individual client to help them deliver a SOA their clients will value and understand.

The demand for integrated solutions has been a cause for concern in the financial planning community for some time.

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