

Voyant AdviserGo - intelliflo Integration User Guide (v.2)

About This Guide

The purpose of this document is to provide a visual guide for the integration between the intelliflo and Voyant AdviserGo lifetime financial planning tools.

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1.1. About intelliflo

intelliflo is a software and services business specifically set up to support financial advisers and planners in the UK. Their products and services are designed to help advisory businesses get more from their client relationships.

They do this by offering market leading industry tailored CRM software (intelliflo) and consultancy solutions, along with other value-added products and services.

Users of intelliflo software benefit from an open architecture approach, so that they can build what they need, not just use the system that they are given. The software provides functionality to provide efficient service propositions, full details of clients, their assets and liabilities, investments and insurance policies are held in intelliflo with links for regular updates.

1.2. About Voyant

Voyant provides market leading, state-of-the-art lifetime financial planning tools that are used during an adviser's client engagement, fact finding and ongoing review processes. To utilise these functions, client details regarding their family and holdings are required. Much of this data is also stored in intelliflo.

1.3. The Solution

Voyant and intelliflo have created an integration that enables data stored within intelliflo to be imported into Voyant. The objective of this integration is to minimise the effort of re-keying data into Voyant and to reduce the opportunity for error. It must be noted that whilst the intelliflo and Voyant data schemas have many matching similarities and share many data items in common, there are many additional data items that are unique to each system. Therefore, when the integration has been processed and intelliflo data has been imported into Voyant, it is likely that the User will need to add additional data and check certain fields in Voyant. Hence our objective; to "minimise" re-keying rather than eliminate additional keying of data into Voyant.

2. The Integration

2.1 intelliflo Store guide

Navigate to your intelliflo store via 'Adviser Workplace', search for Voyant and click to install the Voyant connector app.

2.2 Import client option

Through this integration, information that is stored originally in the intelliflo Fact Find can be imported into Voyant's AdviserGo planning software.

View a quick video on how the integration works in the link below:

<https://www.youtube.com/embed/z024EflmgnY>

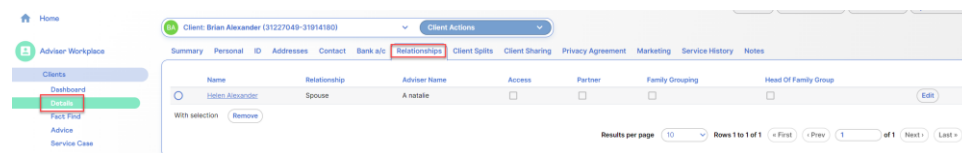
3. Voyant components that support the intelliflo import.

The following sections show intelliflo screens where the data is extracted from. An intelliflo to Voyant data map follows each screen shot that specifies the exact intelliflo fields pulled across to Voyant.

3.1 Relationships

Mapped in intelliflo >Client>Details>Relationships

Data input via>Client actions>add relationship

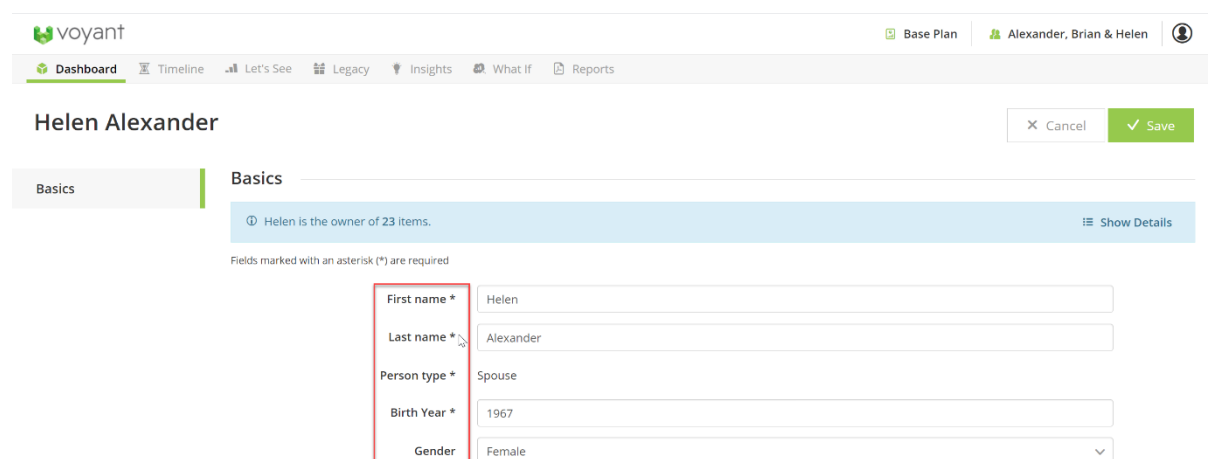


intelliflo field	Pull through to [PEOPLE] in Voyant
{Name}	{First name & Last name}
{Relationship}	{Person Type}
{Date of birth}	{Birth Year}
{Gender}	{Gender}

Relationship	Person Type
Partner	Non-legal partner
Civil Partner	Non-legal partner
Common Law	Non-legal partner
Engaged	Non-legal partner
Child	Child
Sibling	Other

Note: Adding child in io after plan has been imported does not pull across during an update.

Fields in Voyant populated on import



3.2 Employment/Income

Mapped in intelliflo>Clients>Fact Find>Employment

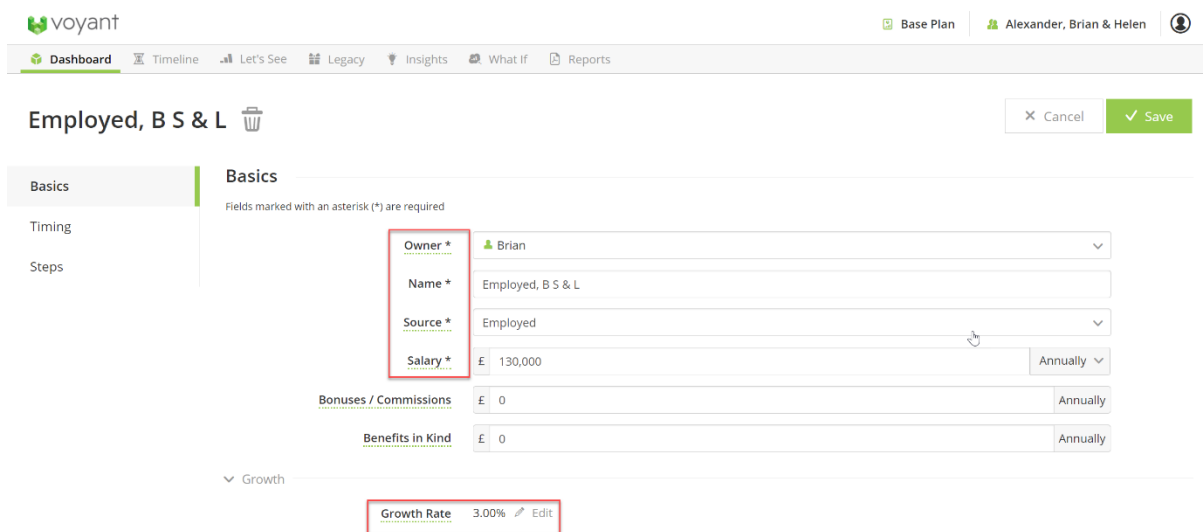
Data input via>Fact find>employment>employment details> add



intelliflo Field to complete	Pull through to [INCOME] in Voyant
{Owner}	{Owner}
{Employment Status}	{Source}
{Employer}	{Name}
{Gross Basic Annual Income}	{Salary}

Employment Status	Source
Employed	Employed
Self Employed	Other income
Company Director	Employed
Retired	Other income taxable

Fields in Voyant populated on import



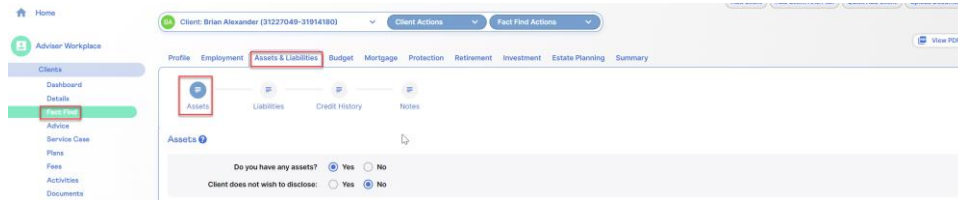
Tips

- If bonuses added in intelliflo under 'Gross guaranteed annual bonus' this pulls across as an additional entry type 'other income' into Voyant. Delete and add in the details in the employment screen in Voyant
- Always check your growth rate in plan settings under 'National Average Earnings', this will index employment growth until retirement and is editable for the individual's income

3.3 Assets & Liabilities

Mapped in intelliflo >Clients>Fact Find>Assets & Liabilities

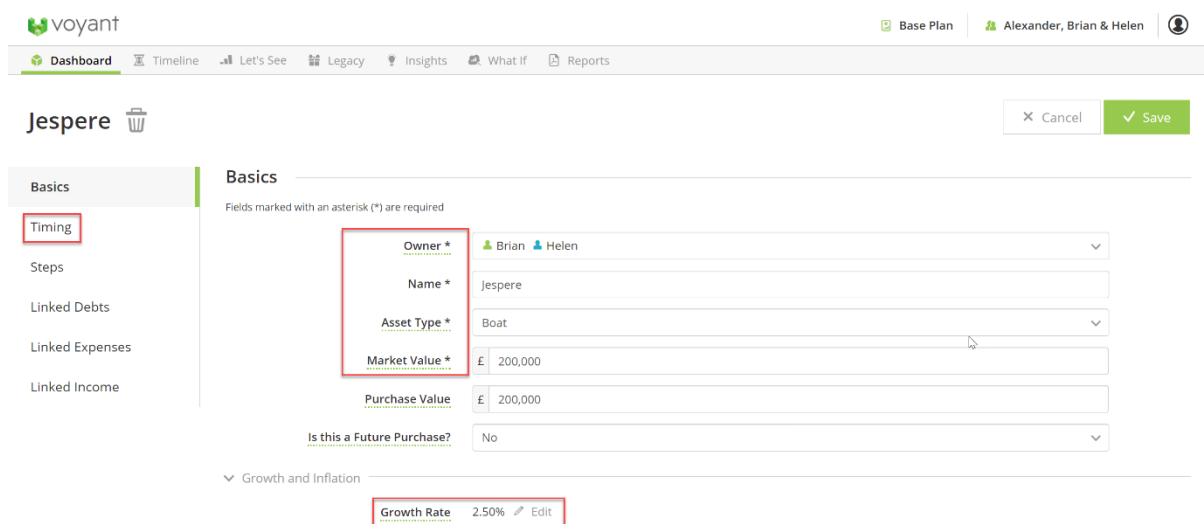
Data input via>Fact find>do you have any assets, click yes>add



intelliflo Field to complete	Pull through to [PROPERTY] in Voyant
{Owner}	{Owner}
{Asset Category}	{Asset Type}
{Description}	{Name}
{Asset Value}	{Market Value}

Asset Category	Asset Type
Boat	Boat
Holiday Home	Holiday Home
Main Residence	Main Residence
Jewellery	Jewellery
Business Property	Business Property
Rental Property	Rental Property
Cash	Other *
Buy to let	Other *

Fields in Voyant populated on import



Tips

- * EXISTING CASH ACCOUNTS – either add under existing investments in the fact find to pull correctly into Savings in Voyant, or add as a plan

- BTL ACCOUNTS - need to amend 'asset type' in Voyant to reflect accurately or use Rental Property as plan type in IO to pull through correctly.
- Enter a purchase value of the asset in Voyant to calculate Capital Gains Tax if applicable
- Note – entries in Liabilities DO NOT PULL THROUGH. If entering a mortgage debt, enter as a plan or within the fact find section under Mortgage.

3.4 Budget/Income

Mapped in intelliflo >Clients>Fact Find>Budget>income

Data input via>Fact find>budget>income>add



intelliflo Field to complete	Pull through to [INCOME] Voyant
{Owner}	{Owner}
{Category}	{Name} {Source for employed details}
{Description}	{Name}
{Frequency}	{Amount}
{Gross Amount}	{Amount} {Salary for employed}

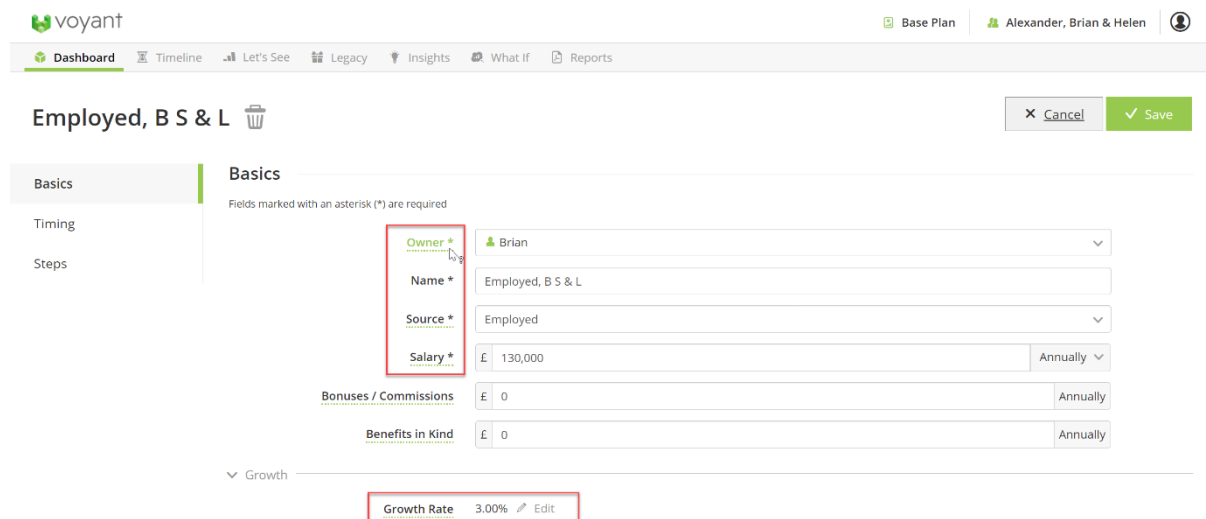
Income Category	Name & Tax Status
{Pension Drawdown}	{Pension Drawdown} {Tax Status} {Taxation Type} {Earned Income}
{Dividends}	{Dividends} {Tax Status} {Taxation Type}
{Rental Income}	{Rental Income} {Tax Status} {Taxation Type} {Earned Income}
{Company Pension}	{Company Pension} {Taxable} {Taxation Type} {Earned Income}
{Private Pension}	{Private Pension} {Tax Status} {Taxation Type} {Earned Income}
{Basic Income}	{Employed}
{Bonus Guaranteed}	{Other} {Tax Status} {Taxation Type} {Earned Income}

Tips

- Entering State Pension in this field will pull across to the pensions field in Voyant.
- Reminder: If bonuses are added in intelliflo under 'Gross guaranteed annual bonus' this pulls across as "other income" into Voyant. Delete and add in the details in the employment screen in Voyant

- KEY - If entering drawdown pension income in Voyant it is best to instead set up the Pension via the pensions screen and take money from that via a Planned Withdrawal every year and stops once the pension pot has run out. Delete from the Income section if doing this way. This will show the remaining balance on the pension after income has been drawn down

Fields in Employment {Basic Income in intelliflo} populated on import




















All other fields populated under income in intelliflo pull through as {other income} into Voyant Type in dashboard

Tip

- Avoid cross-checking - Complete description field in intelliflo to easily identify on import

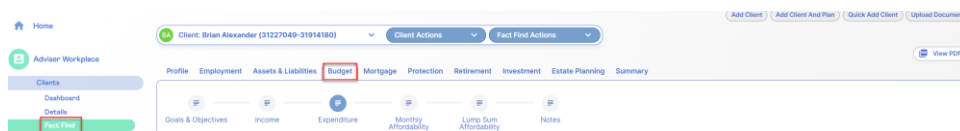
Income data reflected in Dashboard in Voyant

Income 9		
Name	Type	Value
 Employed, B S & L	Employed	£130,000
 Employed, GSK 	Employed	£70,000
 Employed, B S & L 2 	Employed	£129,996
 Aegon Drawdown 	Other Income	£1,200
 Dividends 	Other Income	£10,000
 Rental Income 	Other Income	£780
 Company Pension 	Other Income	£488
 Private Pension 	Other Income	£1,100
 Employed, B S & L 3 	Other Income	£15,000

3.5 Budget/Expenditure

Mapped in intelliflo >Clients>Fact Find>Budget>income

Data input via>Fact find>do you wish to carry out a detailed expenditure analysis>yes



intelliflo Field to complete	Pull through to Voyant
[Basic Essential Expenditure]	
{Category}	{Name}
{Owner}	{Owner}
{Description}	{Name}
{Net Amount}	{Amount}
{Frequency}	{Amount} *pulls through annual on dashboard only, click into expense to view/edit frequency
[Basic Quality of Living]	
{Category}	{Name}
{Owner}	{Owner}
{Description}	{Name}
{Net Amount}	{Amount}
{Frequency}	{Amount} *pulls through annual on dashboard only, click into expense to view/edit frequency
[Non-essential outgoings]	
{Category}	{Name}
{Owner}	{Owner}
{Description}	{Name}
{Net Amount}	{Amount}
{Frequency}	{Amount} *pulls through annual on dashboard only, click into expense to view/edit frequency

Fields in Voyant populated on import

Dashboard Timeline Let's See Legacy Insights What If Reports

Council Tax

[Cancel](#) [Save](#)

Basics

Details


Timing

Steps

Payment Sources

Basics

Fields marked with an asterisk (*) are required

Owner *  Brian

Name * Council Tax

Amount * £ 180 Monthly


Tax Deductible No



Inflation

Inflation Rate 2.50% [Edit](#)

Tips

- Avoid cross-checking -If expenses pull through as 'other' always complete the description field in intelliflo expenses- this makes the expense easier to identify on import. All expenses are imported as annual figures on the dashboard but will reflect the frequency of the payment when you click into the expense. You can further adjust the priority of the expense once imported into Voyant.

 Expenses 26

Name	Type	Amount
 Household 	Multi Year Expense	£9,600

Basics

Details


Timing

Steps

Payment Sources

Basics

Fields marked with an asterisk (*) are required


Owner *  Brian

Name * Household

Amount * £ 800 Monthly

Tax Deductible No

Priority

Highest  Basic Leisure Luxury Lowest

Inflation

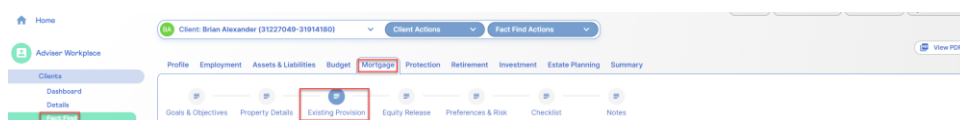
Inflation Rate 2.50% [Edit](#)

- Check inflation rate on growth for expenses is accurate

3.6 Mortgages

Mapped in intelliflo>Clients>Fact Find>Mortgage>existing provision

Data input via>Fact find>Mortgages>client actions>add plans or add in fact find



intelliflo Field to complete	Pull through to [DEBT] in Voyant
{Product name}	{Name} {Debt Type}
{Interest rate %}	{Interest Rate}

Mortgage Type	{Name} {Debt Type}
{Equity Release}	{Equity Release} {Other}
{Existing Mortgage}	{Existing Mortgage} {Mortgage}
{Mortgage Shared Ownership}	{Mortgage Shared Ownership} {Mortgage}
{Mortgage BTL Regulated}	{Mortgage BTL} {Mortgage}
{Mortgage (Standard Residential)}	{Mortgage (Standard Residential)} {Mortgage}
{Mortgage}	{Mortgage} {Mortgage}

Debt & Loans 8		
Name	Type	Amount
Equity Release	Debt	£0
Existing Mortgage	Debt	£0
Mortgage Shared Ownership	Debt	£250,000
Mortgage BTL	Debt	£300,000
Equity Release 2	Debt	£0
Mortgage (Standard Residential)	Debt	£0
2.Mortgage Standard Residential	Debt	£0
3.Mortgage	Debt	£0

Tips

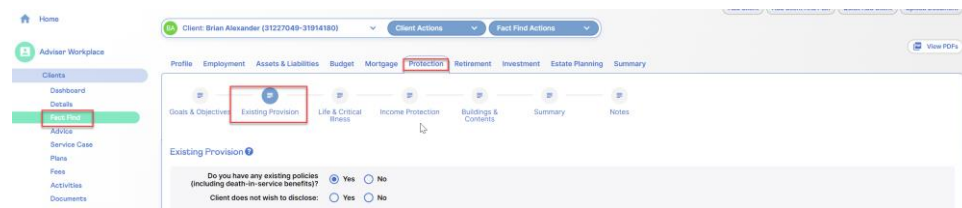
- Check balance field to populate on import in Voyant
- Check payment type on import in Voyant
- Equity Release to be deleted and add as Line of Credit in Voyant
- Mortgages entered as Mortgage BTL Regulated & Mortgage Shared Ownership pull across premiums & valuation – link to property in Voyant
- APPLIES TO ALL PROPERTY TYPES: Make sure to link the debt to the property so if the property is sold, the debt is paid off. Link via Debt or Property entries. Unlink the debt if mortgage to be paid off early.

3.7 Protection

Mapped in intelliflo >Clients>Fact Find>Protection

Data input via>Fact find>Existing provisions>Add as plans or via fact find

(Or add via client actions add plans)



Type of protection contracts inputted in intelliflo

Owner	Provider	Policy Number	Currency	Type Of Contract	Start Date	Expiry Date	Premium	Premium Frequency	Life Cover Sum Assured	Critical Illness Sum Assured	Life Assured	Assigned / In Trust	Actions
Brian Alexander	@SPP		GBP	Group Income Protection			£400.00				Client 1		Edit Delete
Brian Alexander	@SPP		GBP	Income Protection			£550.00				Client 1		Edit Delete
Brian Alexander	@SPP		GBP	Long Term Care			£330.00				Client 1		Edit Delete
Brian Alexander	@SPP		GBP	Term Protection			£220.00		330,000.00		Client 1		Edit Delete
Brian Alexander	@SPP		GBP	Whole Of Life			£550.00		1,000,000.00		Client 1		Edit Delete
Brian Alexander	Abbey Life		GBP	Group Death In Service			£300.00			300,000.00	Client 1		Edit Delete
Brian Alexander	Canada Life		GBP	Relevant Life Policy (Level - CI)			£0.00			200,000.00	Client 1	<input checked="" type="checkbox"/>	Edit Delete
Brian Alexander	Canada Life		GBP	Relevant Life Policy (Level - Life & CI)			£0.00		1,000,000.00	250,000.00	Client 1	<input type="checkbox"/>	Edit Delete

Fields Pulled across into Voyant

Name	Type
DIS	Term & Endowment
Term Protection	Term & Endowment
Group Income Protection	Income Protection
Income Protection	Income Protection

intelliflo Field to complete	Pull through to [PROTECTION] in Voyant
[Existing Provisions]	
{Owner}	{Policy Owner}
{Type of contract}	{Policy Name}
[Existing Protection Plan]	Type
{DIS}	{Term & Endowment}
{Term Protection}	{Term & Endowment}
{Group Income Protection}	{Income Protection}
{Income Protection}	{Income Protection}

Tips

- Complete linked employment/coverage type/coverage amount/benefit duration for IP Policies on import to Voyant
- Premiums and sums assured do not pull through
- Complete Beneficiaries on import to Voyant for DIS & Term Protection plans
- Check Timing for when the policy is in place in the plan

3.8 Retirement

Mapped in intelliflo>Clients>Fact Find>Retirement

Data input via>Fact find>Retirement>Client actions> Add as plans or via fact find



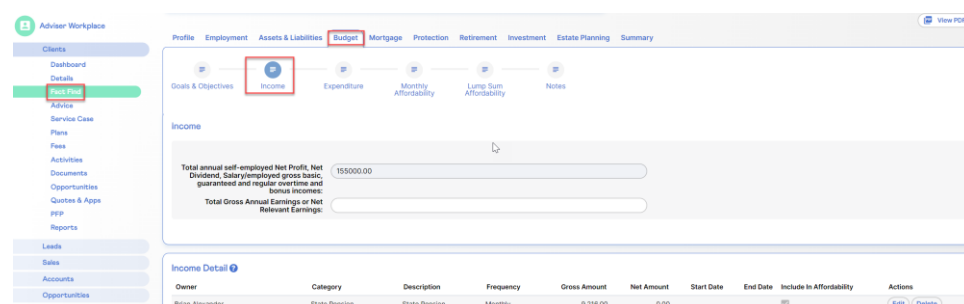
intelliflo Field to complete	Pull through to [PENSIONS] in Voyant
[Final Salary]	
{Owner}	{Owner}
{Product name}	{Name}
[Money Purchase]	
{Owner}	{Owner}
{Plan Type}	{Type}

{Product Name}	{Name}
{Valuation}	{Balance}
[Personal Pensions]	
{Owner}	{Owner}
{Plan Type}	{Type}
{Product Name}	{Name}
{Valuation}	{Balance}
[Annuities]	
{Owner}	{Owner}
{Plan Type}	{Type}
{Product Name}	{Name}



Plan Type	Pull through to [TYPE] in Voyant
[Final Salary]	[Final Salary]
[Money Purchase]	
{Money Purchase Contracted}	{Occupational Pension}
{Group SIPP}	{Group SIPP}
{SIPP}	{Personal Pension}
{Group Personal Pension}	{Group Personal Pension}
{Personal Pensions}	{Personal Pensions}
{Appropriate Personal Pension}	{Appropriate Personal Pension}
[Annuities]	
{Pension Annuity (Flexible)}	{Drawdown}
{Pension Annuity (Conventional)}	{Annuity}
{Pension Annuity}	{Annuity}
{Enhanced Pension Annuity}	{Annuity}
[Drawdown]	
{Income Drawdown (Capped)}	{Existing Drawdown}
{Income Drawdown (Flexible)}	{Existing Drawdown}
{Income Drawdown (Flexi-Access)}	{Existing Drawdown}
{Income Drawdown (Beneficiary)}	{Existing Drawdown}

Tips

- State Pensions – add under budget/income in intelliflo to pull through correctly to Pensions in Voyant
- Final Salary Scheme's only pull through Type and Name
- Check all fields in Voyant. (Status/Linked Employment or Pensionable Salary, Escalation Rates, Accrual Rate, Salary Scheme, Years of service to date, Annual Pension if deferred or in payment)
- See inline help (<https://support.planwithvoyant.com/hc/en-us/articles/360051181412-Switching-on-Inline-help-in-AdviserGo>)



Owner	Category	Description	Frequency	Gross Amount	Net Amount	Start Date	End Date	Include in Affordability	Actions
Brian Alexander	State Pension	State Pension	Monthly	9,216.00	0.00			<input checked="" type="checkbox"/>	Edit Delete

Pensions Show Overview 24		
Name	Type	Value
 Brian's State Pension 	State Pension	£9,216

- Appropriate Personal Pension – "Ideally do not use" as type in intelliflo, pulls through to Voyant but one is only able to edit the details of this pension in Adviser. Rather use Personal Pension as plan type in intelliflo to pull across correctly into Voyant.

Dashboard Timeline Let's See Legacy Insights What If Reports

Appropriate Personal Pension


Basics

Growth
Timing
Steps
Crystallisations
Transfers
Withdrawal Limit
Planned Withdrawals
Annuitization

Basics

Fields marked with an asterisk (*) are required

Please use Adviser to edit this Money Purchase type's details.

Owner *  Viktor

Name Appropriate Personal Pension

Type Money Purchase

Balance £120,000

Expected ,
 Cash

Final Salary Scheme


 Cancel  Save

Basics

Timing

Basics

Fields marked with an asterisk (*) are required

Owner *  Viktor

Name * Final Salary Scheme

Status * Active

Linked Employment * Employed, DFB

Use Base Salary Only No

Pensionable Salary £ 0 Annually

Escalation Type in Deferment None

Escalation Type in Payment None

Survivor Per Cent 0 %

Accrual Rate * 1/80th

Salary Scheme Last Year

Years of Service to Date 0 years

- Annuities – Check status & add amount

Pension Annuity


✕ Cancel



Basics

Basics

Fields marked with an asterisk (*) are required

Owner *	 Viktor		▼
Name *	Pension Annuity		
Status *	In Payment		
Type *	Pension		
Capital Protected	No		
Payment Amount *	£ 900	Annually	▼
Payout	Single		
Guarantee (Years Certain)	0		

- Crystallisation instructions do not pull through to Voyant
- Complete TIMING on import

3.9 Investments

Mapped in intelliflo >Clients>Fact Find>Investment

Data input via>Fact find>Investments>Client actions> Add as plans or via fact find



Intelliflo Field to complete	Pull through to [SAVINGS & INVESTMENTS] in Voyant
{Owner}	{Owner}
{Product name}	{Name}
{Plan Type}	{Type}
{Valuations}	{Balance}
Plan Type	Pull through to [TYPE] in Voyant
{National Savings (Premium Bonds)}	{National Savings Certificate}
{National Savings}	{National Savings Certificate}
{Savings Accounts}	{Savings Accounts}
{Cash Account}	{Savings Account}
{Collective Investment Account}	{Unwrapped Investments}
{Insurance Investment Bond}	{Onshore Bond}
{Offshore Bond}	{Offshore Bond}
{General Investment Account}	{Unwrapped Investments}
{Enterprise Investment Scheme}	{Enterprise Investment Scheme}
{Stocks & Shares ISA}	{Stocks & Shares ISA}
{Cash ISA}	{Stocks & Shares ISA}

Tips

- Bonds – On import complete purchase value, year purchased, segments, withdrawal strategy, previous withdrawal or top ups.

Offshore Bond

Cancel

Basics

Growth

Beneficiaries

Timing

Steps

Transfers

Withdrawal Limit

Planned Withdrawals

Basics

Fields marked with an asterisk (*) are required

Owner * Viktor

Account Name * Offshore Bond

Type * Offshore Bond

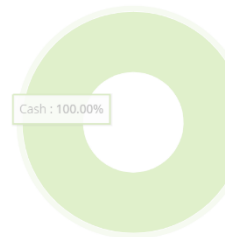
Is this an existing investment Yes

Year Purchased * 2021

Balance £ 78,000

Purchase Value * £ 10,000

Insurance Payout First to die



Expected Average

Cash

- Complete TIMING on import
- Check growth rates
- Contributions and Withdrawals do not pull across
- Valuations pull across
- Cash ISA – all pull through to Stocks & Shares ISA – Move to Savings > CASH ISA product or change growth rates on the account
- Some ISA & Pension balances pull across with balance field unable to edit.

To make the balance field editable in ISA's or Pensions in Voyant on import from intelliflo:

If a portfolio has been imported with holdings the ISA's/Pensions balances are not editable. If you did want the holdings to be applied, you would need to have the Morningstar Integration with Voyant.

Planned Withdrawals

Dashboard

Funds & Holdings

Funds & Holdings

Basics

Growth

Timing

Steps

Transfers

Withdrawal Limit

Planned Withdrawals

Rate

Portfolio

Holdings

This action will clear all of your holdings.

Cancel Continue

Calculated Portfolio Edit

100.00%

Cash 100.00%

3.This will remove the holdings

Withdrawal Limit

Planned Withdrawals

Balance £ 4,405

Purchase Value £ 0

Taxation

Expected Average

Cash

