COIN

Smart, connected, technology

Innovative financial planning software

COIN allows you to access, consolidate and communicate all your investment, superannuation, debt, insurance and estate planning information with remarkable efficiency.

Fundamentally COIN makes your system scalable and client centric. This allows you to deliver a more streamlined, consistent and complete service to your clients - saving you time, money and resources.

For financial advisers and financial advice practices

COIN allows financial advisers to manage client engagement and the execution of their clients' lifetime financial strategy, securely and within an up-to-date compliant environment with real time intelligence.

The software is designed to seamlessly manage business processes and provide responsive reporting, allowing the practice to focus on their clients.

Enabling efficiencies

COIN connects and automates the complete spectrum of practice functions that includes

- A single point of data entry
- Client and portfolio management
- Insurance planning
- Comprehensive modelling
- Efficient SoA production
- Sophisticated workflow management
- Enterprise reporting
- Client engagement tools
- Insurance planning
- Remote access to client information

Contact us today to find out more

email sales@rubik.com.au or call 02 9488 4000

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COIN modules at a glance

INC

Complete an insurance needs analysis, assess appropriate insurance products and populate advice documents to meet your client's insurance needs.

DICE

A client relationship management module that connects other key modules and allows you to enter client data, file notes, assign tasks, create and store client documents and generally manage and report on client information.

FACT FIND

Data entry point for the creation of new client groups, as well as updating and modifying existing client group records.

PYRAMID

A wizard driven point of sale tool allowing you to establish and refine your client's lifestyle and retirement goals.

QUICK PLAN

COIN's fully customisable Quick Plan wizard allows fast, efficient and compliant generation of scaled advice documents.

DOCDESIGNER

A comprehensive tool for building and maintaining your library of templates (SOA and standard templates).

STRATEGY

A comprehensive cash flow and strategic modelling tool that allows for transactional cash flow analysis where you can model precisely at the asset class, sector or product level.

PROVISIO

Provides access to external web services, which allows you to access real-time data from selected providers.

TOOLS

A standalone specialised module with over 25 tools for users to perform quick calculations.

ANALYSER

Portfolio management tool allowing you to conduct portfolio modelling, rebalancing and reporting across all entities.

CLIENT MANAGEMENT

Effectively data mine and communicate easily with your clients, query reports and run batch mail-outs using post or email.

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