



Digital Advice

by Midwinter

Expand your service offering with a scalable, always-on Digital Advice solution.

Digital Advice is a cost-effective way to support and reach clients for low touch interactions.

It offers digital, self-guided options where appropriate, with escalation to a human for more complex requirements. As the onramp to a full financial advice solution, Digital Advice caters to customers who are typically unengaged or out of reach.

Using Digital Advice, you can guide these customers through a standardised, rules based, and simplified process delivered digitally and instantaneously from your own branded interface.

A true omnichannel advice solution, Digital Advice creates a seamless customer experience from one channel to the next. So, whether your customers prefer to engage online, by phone or face-to-face, they can expect consistent advice and service levels at every touch point.

Digital Advice integrates seamlessly with Midwinter's financial advice platform AdviceOS and many other registry systems and CRMs through our open API.



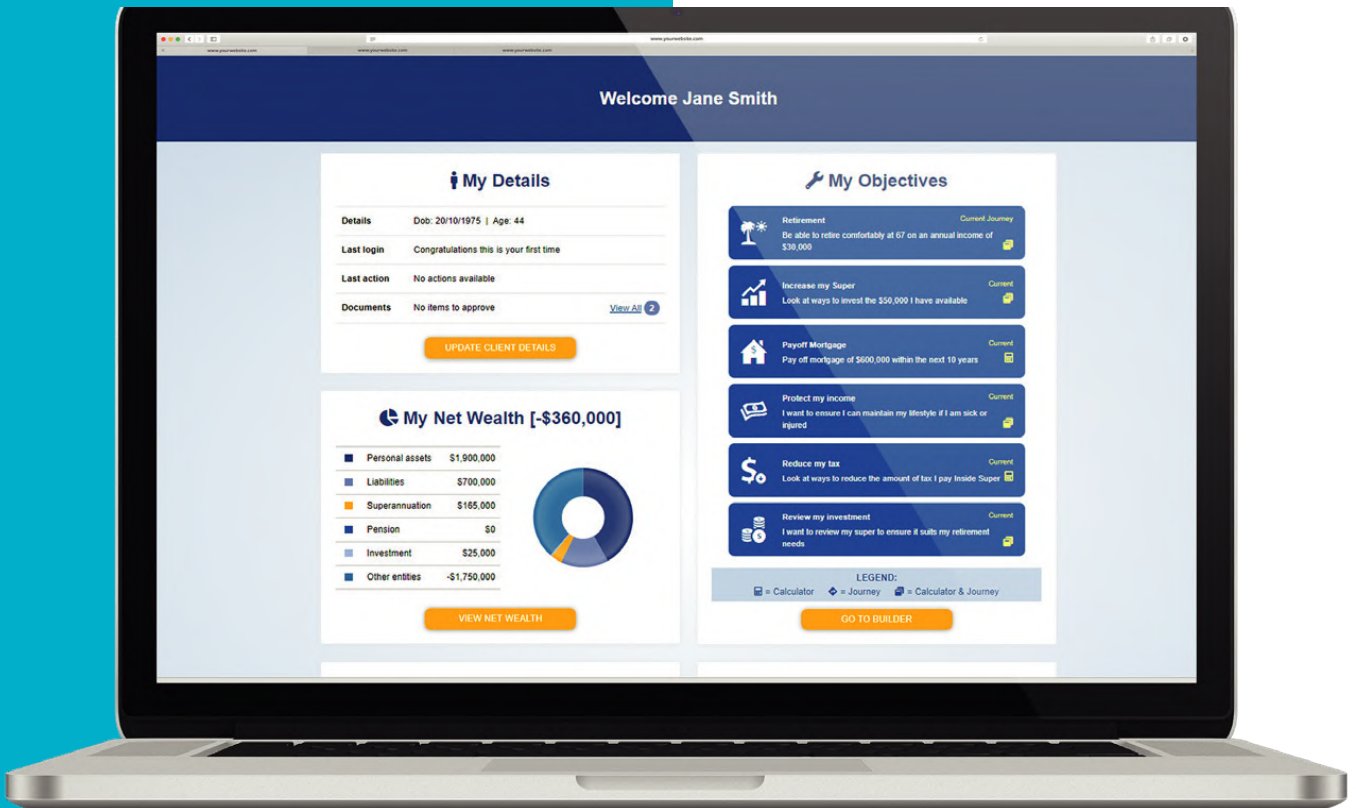
Create personalisation at scale.



Ensure a consistent experience through every channel, every time.



Reduce service delivery costs.



Customers using advice at scale



200+ Dealer groups & industry funds



2,000+ Advisers & admin staff



1,500+ Advice documents generated per day



60,000+ Digital users

A true omnichannel advice offering



Public calculators & non-authenticated tools



Self-directed digital advice



Phone based advice



Face to face advice

OUR DIGITAL FRAMEWORK



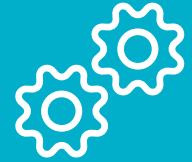
Optimal
operating costs



Total client
ecosystem



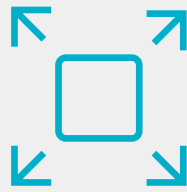
Extensive
modelling capabilities



Highly
configurable



True
omnichannel



Provision of
advice at scale



Open
architecture



Modern IT
stack

About Midwinter

At Midwinter, we know there's a human interaction behind every quality advice experience.

That's why we're focused on supporting you, with software that simplifies how you deliver advice. From managing compliance to scaling your practice, our software solutions support your everyday tasks so you can focus on providing great advice and growing your business.

Over the past few years, the Midwinter team has worked closely with clients both big and small to build the best advice solutions on the market.

Midwinter's digital advice framework seamlessly interacts with our flagship AdviceOS platform, enabling advisers to deliver quality advice at a lower cost and greater scale, and providing a new way for advisers to engage with their clients.

Our solutions meet the evolving needs of the advice industry, its consumers and the humans who provide financial advice.



Get in Touch Today

Midwinter Financial Services Pty Ltd

Phone: 1300 882 938 Email: sales@midwinter.com.au

Level 6, 345 George Street,
Sydney NSW 2000