

**“ GREAT TECHNOLOGY
THE BACKBONE OF ANY SOUND FINANCIAL PRACTICE ”**



TESTIMONIALS

“ I have been associated with PTFS now for some years, having used them for my life insurance business since starting my own firm back in the MCCB days. Over that time I have got to know Martin, Amanda and the team fairly well.

As ToolBox has developed I have had several chances to use it, but each time I have not taken to it. However, having recently been at the Trinity Park Headquarters, flirting with the idea of going as a PTFS AR - and then deciding that I was still a dyed-in-the-wool DA - one of the good outcomes was I could see how much of an advance the Toolbox system has made.

ToolBox and its accessories are available to DA's as well as AR's. The front end of it allows you to input all your client details into the fact find and then using this information go into Trigold or Mortgage Brain; also free access to Assureweb or Weblines and direct input to the latest web engines of PTFS Household and ASU sourcing.

It is a full client and business management tool, allowing you to process and monitor a full compliant sale for your client, from client creation through to quoting and letter generation. Recording your client correspondence and creating tasks.

The other thing is that you can choose what parts of the system you want to use; if you do not want to go fully electronic with your client files, you can do a combination of both things, paper and electronic, it's up to you. You can scan documents onto the client file as well. Within Toolbox there are also compliant 'reasons why' letters, which can be adapted to suit your needs or you can stay with your own.

It's worth a look at; why not give PTFS a call to try it? There is nothing to lose and maybe much to gain from using a fully integrated front and back office complaint system like ToolBox. ”

Danny Lovey, The Mortgage Practitioner

“ Personal Touch have been at the forefront of technology development for its members and for this reason, Abbey has selected the Toolbox system for a complete end to end integrated solution to make life easier for the intermediary. Reduced keying, reduced costs and improved customer service are all major benefits that Abbey can deliver through the Toolbox system with Personal Touch. ”

Abbey for Intermediaries

“ IMS - Independent Mortgage Services Ltd have been associated with PTFS for just over 18 months. Having tried a couple of the other Networks out there, I wanted to use a company who would give my company something in return, rather than just sit back and take a proportion of our commission. After researching the market and having a meeting with a PTFS Sales Manager, I found their proposition to be very attractive. They were able to offer my company a multitude of services and products, and have always been very approachable and helpful in helping my business grow”
“The Toolbox system is absolutely incredible and has allowed us to operate a completely paperless office. From a compliance point of view the Management Information Toolbox is able to produce at the touch of a button is a great help and allows easy monitoring of the company and individual Advisers business. Too many companies are quite happy to take and not give in this industry. In all of my dealings so far I can honestly say that I have been more than impressed with the service, support and the financial package that PTFS have offered and would recommend anyone thinking of changing network or looking for some more support to have a meeting with them and see for themselves. ”

**Terry Broom
Director - IMS - Independent Mortgage Services Ltd**