

# Press Release

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## Trustfolio and AdvicePro enhance adviser support to clients

AdviceUK, the UK's largest network of advice-giving organisations, has today announced an exciting collaboration with Trustfolio and AdvicePro to offer an initial free 3 months' instant access to client credit reports. This service enables advisers to enhance the quality and speed of service they are able to offer clients, saving time and money by removing the administrative burden of gathering clients' financial information.

The seamless integration of the Trustfolio Debt Adviser Support Portal functionality with the AdvicePro Case Management System allows advisers to easily access client data within one platform.

The trial offer is open to AdviceUK members using AdvicePro in England. However, anyone can sign up to use the IMA award-winning Trustfolio Debt Adviser Support Portal on a paid-for basis. Users benefit from instant access to Experian & TransUnion credit reports with account numbers and 12 months' bank statements, which are automatically categorised into monthly income and expenditure.

The service also hosts a panel of Insolvency Practitioners where advisers can review information about each IP with performance statistics and refer a client to an IP for a Trust Deed or IVA with confidence.

The rollout of the trial will commence from the 1<sup>st</sup> April and we are confident that it will have a significant and positive impact on advisers and the clients they serve.

James Jones at Experian says "Timely, comprehensive information is vital to effective debt counselling. Given the positive feedback we've had from advice providers who've already switched to instant online credit reports, this move by AdviceUK is very welcome indeed – particularly as it will also help consumers better understand their finances and improve their financial health sooner."

Ali McLaren, Managing Director of AdvicePro says “AdvicePro is committed to helping advisers streamline their case recording leaving more time to deal with the issues being presented. Advisers taking part in the original pilot program noted an additional 25% time saving as a direct result of being able to access credit reports from within AdvicePro. We’re proud to add this capability as phase one of our ongoing work with Trustfolio”

Lou Yates, CEO & Founder of Trustfolio says “Trustfolio is very proud to be working alongside AdviceUK, Advice Pro and its dedicated network of advice providers. AdviceUK and its members provide diverse and holistic advice to their communities. Seeing the amazing work of members like Money Buddies, Crosslight Advice and many more, has been a source of inspiration and motivation for me and the team at Trustfolio. The team at AdvicePro are as passionate as we are about providing advisors and caseworkers with the digital tools that optimize their time and skills, and let them focus on their clients. For AdviceUK to make this offer of 3 months funding to their members, I think, demonstrates a real tangible understanding of what their members need and how funding in the debt sector needs to be more flexible, accessible and in line with the changing needs of clients in debt and the advice community that serve them.”

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**Notes for editors: -**

1. AdviceUK is a charity supporting independent organisations that give free advice to members of the public. Established in 1979, with 786 members we are the largest network of independent advice centres in the UK.
2. Our members work in some of the poorest parts of the UK, often with marginalised communities, helping people to solve their legal and social welfare problems.
3. For more information on AdviceUK and AdvicePro please visit our websites:  
[www.adviceuk.org.uk](http://www.adviceuk.org.uk)  
[www.advicepro.org.uk](http://www.advicepro.org.uk)
4. For more information on Trustfolio, please visit [www.trustfolio.co.uk](http://www.trustfolio.co.uk)
5. To enquire about membership or participation in any of our extended category schemes or any of the services AdviceUK offers, please contact the AdviceUK membership team on [membership@adviceuk.org.uk](mailto:membership@adviceuk.org.uk)