

# Why PPI Embraces Technology to Give Its Advisors an Edge



PPI Management	
Founded	1978
# of Advisors	5,000+
Headquarters	Toronto, Canada

*PPI is dedicated to elevating independent financial advisors to the next level. As a national insurance marketing organization, it offers unparalleled support, tools, and resources to help independent advisors better serve their clients across Canada.*

## The Opportunity

PPI embraces cutting-edge technology, so its advisors stay relevant, competitive, and successful. The internet and the introduction of robo-advisors made investing more accessible than ever, so the PPI team sought out a tool that could help its advisors stand out and emphasize their value.

Leaning into a more holistic approach, the PPI team decided to hone in on building strong relationships and offering superior client experience— aspects of wealth management a computer could never compete with.

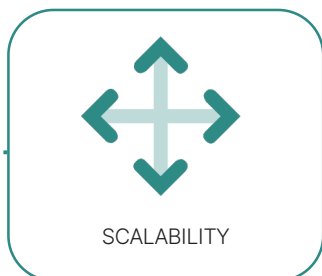
## The Solution

After a single demo of the CapIntel platform, the PPI team knew they found a potential flagship component for their wealth-focused advisors’ toolkit. The sales enablement solution had all the features the PPI team was looking for, including streamlining an advisor’s day-to-day workflow, improving the quality of their proposals, and giving them more time to form meaningful client relationships.

**“It gives our wealth-focused advisors three advantages. First, the platform assists in their professionalism from a compliance and process point of view, secondly, it sets them apart in their research and presentation quality and abilities, and finally, it helps make their business scalable by finding efficiencies in these areas.”**

- Keith Newhook, Senior Vice President, Sales at PPI

The partnership has undoubtedly proved fruitful, says Keith Newhook, Senior Vice President of Sales at PPI. A long-time advocate for embracing technology within the wealth management space, Newhook hails CapIntel as a catalyst for helping PPI unlock new possibilities with Scalability, Transparency, and Talent Attraction.



## The Outcome

### Scalability

PPI knew its advisors wanted more client-facing time, but the manual work of increasing compliance requirements and many steps of the proposal process made it next to impossible.

CapIntel's all-in-one platform has been able to easily fit into an advisor's workday, reducing their admin time and producing world-class proposals at scale.

Power users of the platform make up to 40 proposals per week, and Newhook highlights that what used to take advisors two hours can be done in just minutes on CapIntel.

"Advisors are spending less time doing administrative tasks, like proposal preparation, and they're spending more time finding new clients or growing existing client relationships."

### Transparency

With all the time saved, PPI advisors are more client-focused than ever. CapIntel's comparison tool and graphs help advisors show financial advice in real time, offering an unparalleled level of transparency in the proposal process.

Comprehensive, investor-friendly proposals help advisors foster meaningful conversations and genuine connections. Clients have a clear understanding of an advisor's advice, and the relationship flourishes as the advisor can clearly communicate their value.

"The output is second to none. You're proud to have your name and your branding on it when you present to your clients."

### Talent Attraction

In addition to helping advisors impress clients, Newhook says that CapIntel helps impress other advisors. With the mission to elevate independent financial advisors to the next level, the PPI team counts CapIntel as the backbone of its tech stack to woo other advisors and emphasize the value they can add to their practice.

Newhook credits custom PPI-branded proposals and the platform's ease of use as being key factors when impressing advisors.

"It's one of the key tools in PPI's Stratosphere platform of sales presentation software when it comes to an advisor's wealth practice and is front and center on our demo of what you get when you come to PPI."

81.7%

of CapIntel users saw an increase in their clients' investment deposits year over year.<sup>1</sup> The average increase of these deposits was

39.5%

## The Conclusion

In a world full of financial advice and noise, PPI has helped its advisors stay ahead of the curve by embracing technology that brings out the most human aspects of wealth management—the client experience—and it's worked. In the first six months of routinely using CapIntel, 81.7% of advisors saw growth in their wealth business,<sup>1</sup> with an average increase in sales volume of 39.5%.

<sup>1</sup> 2022 survey of 160 advisors

**"It adds confidence for advisors. It leads to stronger relationships with their customers, more value demonstrated to their clients, and better conversations that lead to new opportunities."**



**Keith Newhook**  
Senior Vice President, Sales  
PPI

### About CapIntel

CapIntel is a B2B fintech company, serving financial institutions across North America. Its intuitive, web-based applications are improving the overall experience for wealth professionals and investors alike. The company's mission is to elevate personal finance and a significant part of this means growing wealth through investments while creating meaningful conversations between advisors and their clients. Its platform helps financial

professionals deliver transparent, data-driven, and personalized information to their clients so they can get a better understanding of their investments and feel at ease knowing their future is secured. With over 14,000 advisors and 800 wholesalers across North America on their platform, CapIntel is transforming the advisor-client experience. See [www.capintel.com](http://www.capintel.com) for more information and follow us on [LinkedIn](#).