

Accountants:

# Rethink the potential of cash

## A smarter approach to managing client cash

As an accountant, your clients rely on you to help them make the most of their financial position. But when it comes to surplus cash, many businesses and individuals miss opportunities to improve returns while maintaining flexibility and FSCS protection.

Insignis is a dedicated cash management platform designed to simplify the way your clients manage their savings. With access to a wide range of competitive savings products from banks and building societies, we help businesses and individuals earn more on their cash while reducing admin.

## Adding value to your advisory services

Partnering with Insignis allows you to add value beyond traditional accounting services. By helping your clients manage cash more effectively, you strengthen client relationships and reinforce your role as a trusted adviser.

### How Insignis supports you and your clients

#### Save time

A single application provides access to a panel of 45+ banks and building societies, removing the need for multiple account openings.

#### Streamlined reporting

We consolidate all interest earned across accounts into a single, easy-to-use report —helping simplify tax reporting and compliance.

#### Enhance returns

We offer access to competitive rates across a variety of savings products, helping your clients grow their cash reserves efficiently.

#### Optimise FSCS protection

Diversifying across multiple banks and building societies can help clients stay within FSCS limits (where eligible).

#### Dedicated support

Our expert account managers provide personalised assistance, ensuring you and your clients have guidance every step of the way.

## Recognised for excellence

We're proud to be recognised by leading industry bodies for our innovation and commitment to helping clients make the most of their cash.

- Fintech Awards London 2024 Highly commended
- Savings Champion 2021 Best Cash Savings Platform