



Finance Consultants application Presentation

Web | Mobile apps | eCom | BPM | Digital Marketing



welcome

Modern Financial Advisory Platform for Finance Consultants

Designed to streamline client management, financial planning, investment advisory, funding assistance, and business operations through one centralized digital platform.

Web Application | Android App | iOS App

Powered by Amrithaa

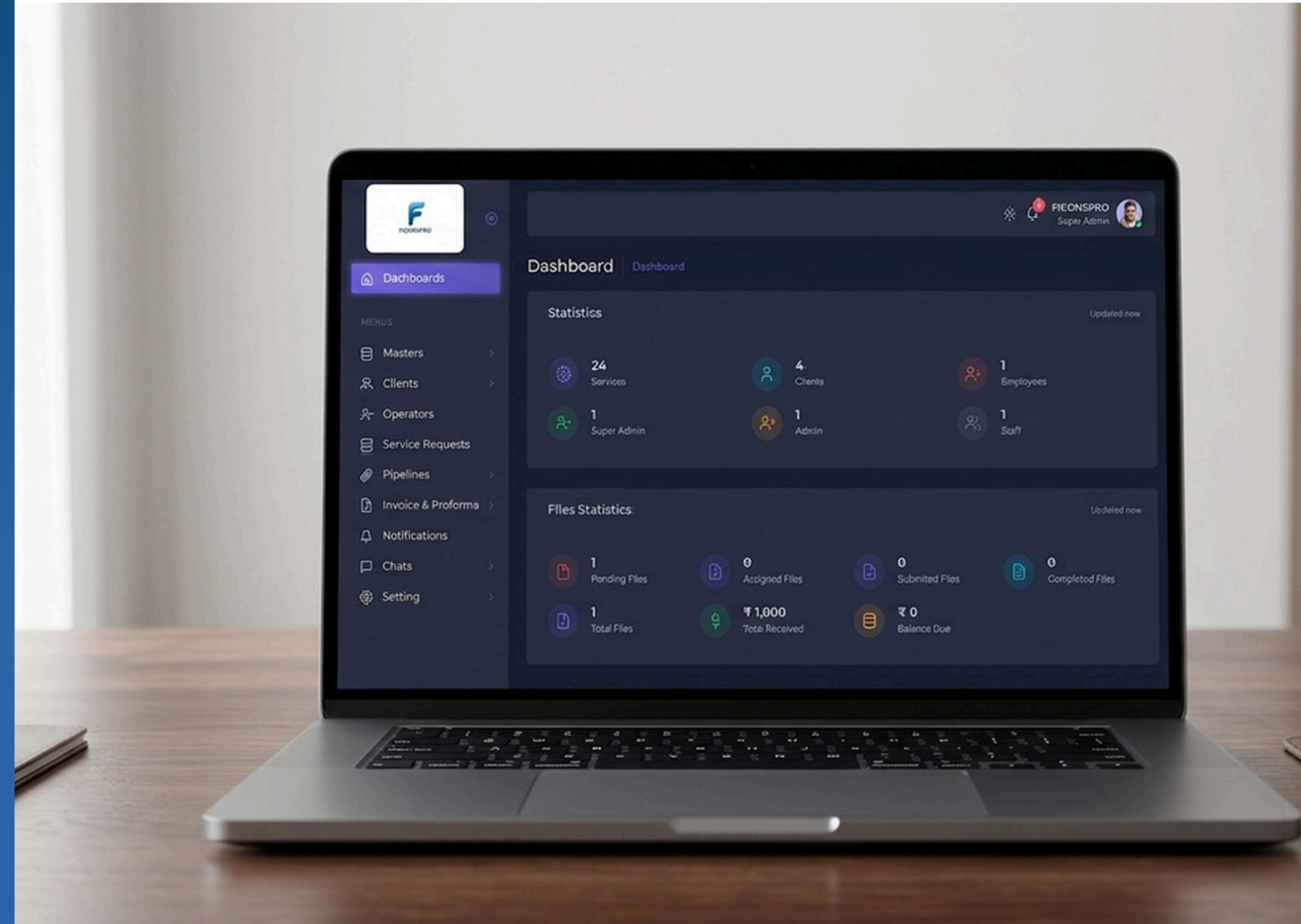


What is Finance Consultants Application?

Finance Consultants Application is a comprehensive digital platform developed specifically for professional financial consultants and advisory firms.

- Client Relationships
- Financial Planning
- Business Finance
- Investment Advisory
- Loan Processing
- Team Collaboration
- Document Management
- Communication

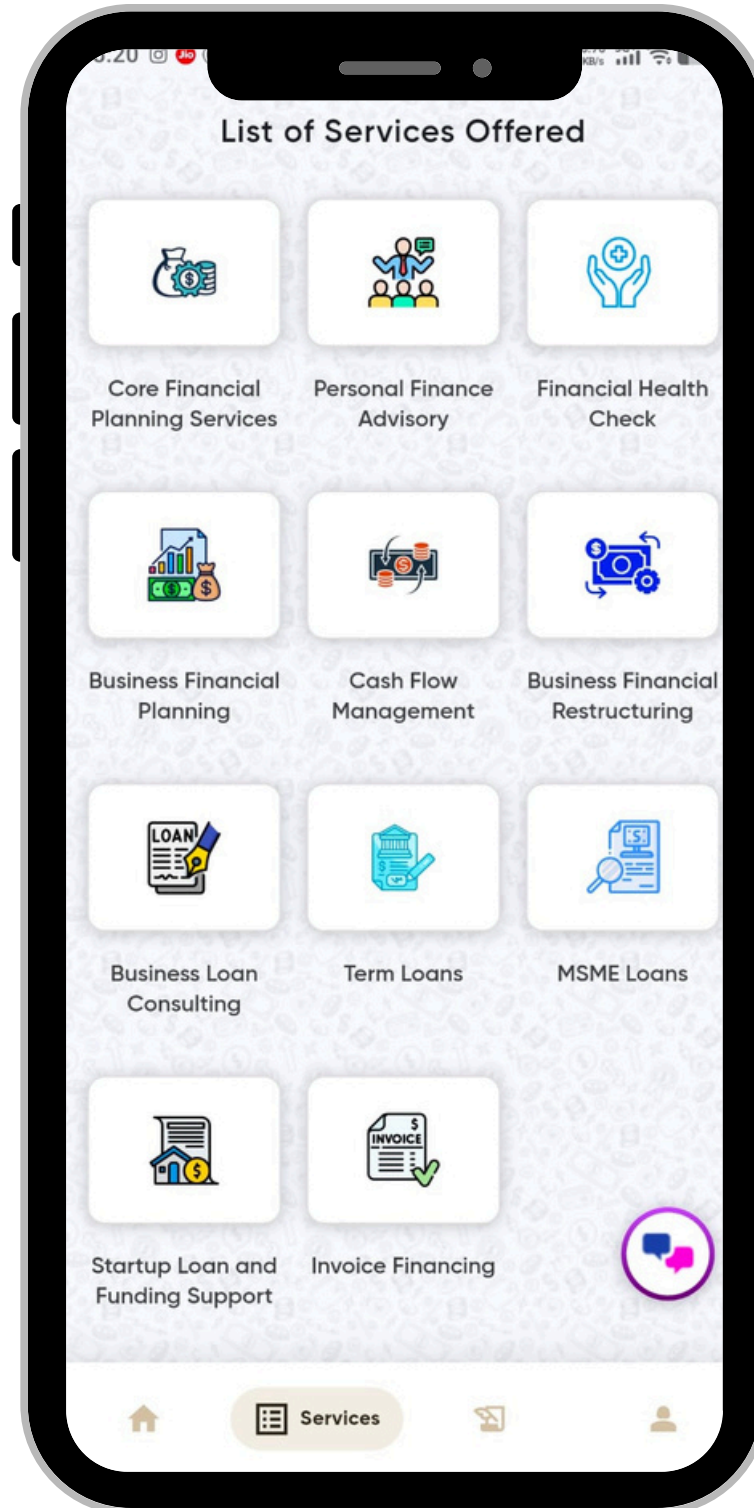
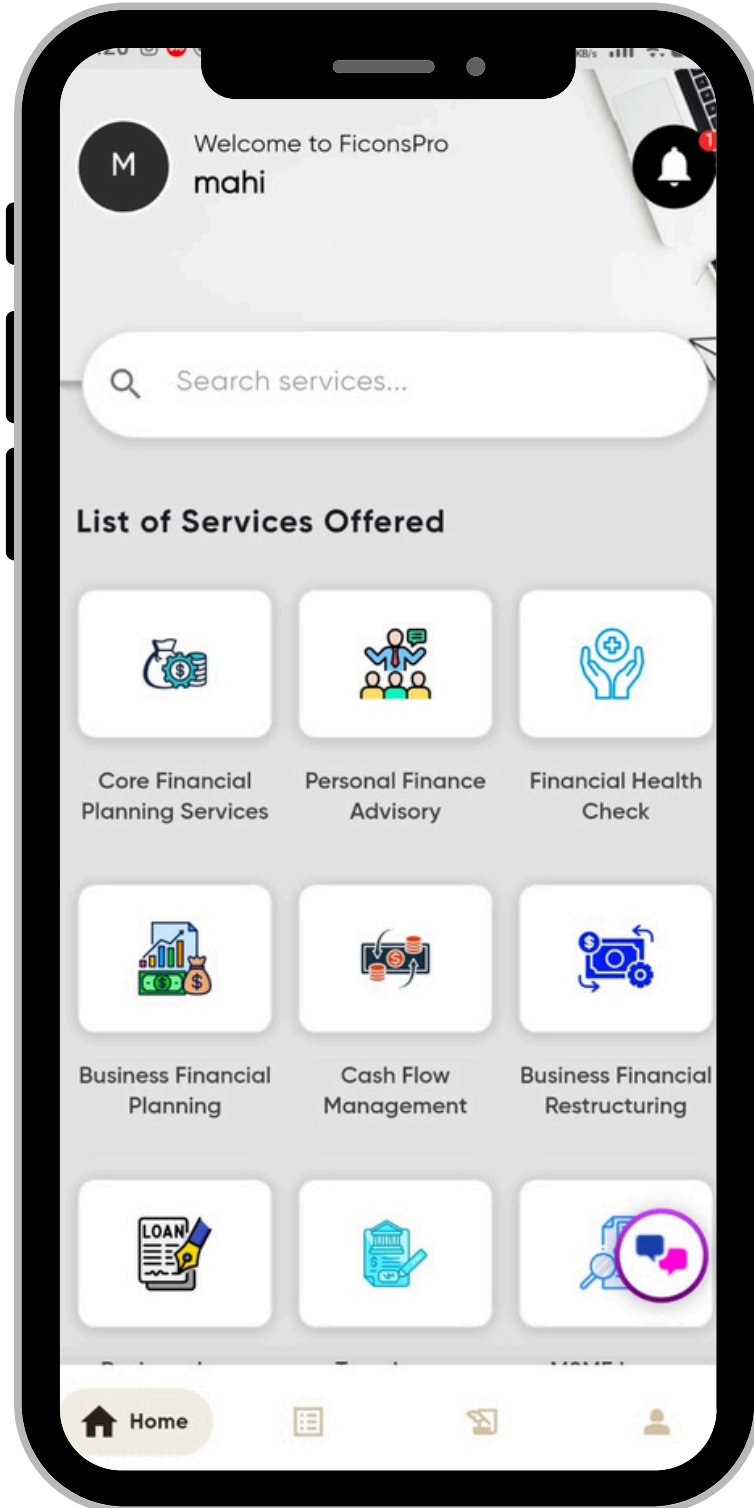
All from one secure platform.



Who Is It For?

Suitable For

- Financial Consultants
- Financial Advisors
- Wealth Managers
- Investment Consultants
- Loan Consultants
- Startup Advisors
- Corporate Finance Consultants
- Independent Financial Professionals
- Financial Service Agencies



Finance Consultants Application — Service List

Core Financial Advisory Services

- Personal Financial Planning
- Financial Health Assessment
- Budget & Cash Flow Planning
- Retirement Planning
- Tax Planning & Advisory
- Wealth Management

Business Finance Services

- Business Financial Planning
- Working Capital Advisory
- Cash Flow Management
- Financial Statement Analysis
- Business Performance Consulting
- Profitability Improvement Strategies

Loan & Funding Services

- Home Loan Assistance
- Business Loan Consulting
- MSME Loan Support
- Startup Funding Assistance
- Project Finance
- Loan Documentation & Processing

Finance Consultants Application — Service List

Investment Advisory Services

- Mutual Fund Advisory
- Equity Investment Guidance
- Fixed Income Investments
- Portfolio Management
- SIP & Wealth Creation Planning
- Risk Assessment & Asset Allocation

Startup Finance Services

- Startup Financial Planning
- Business Registration Support
- Funding & Investor Readiness
- Financial Projections
- Pitch Deck Financial Modeling
- Seed & Venture Capital Guidance

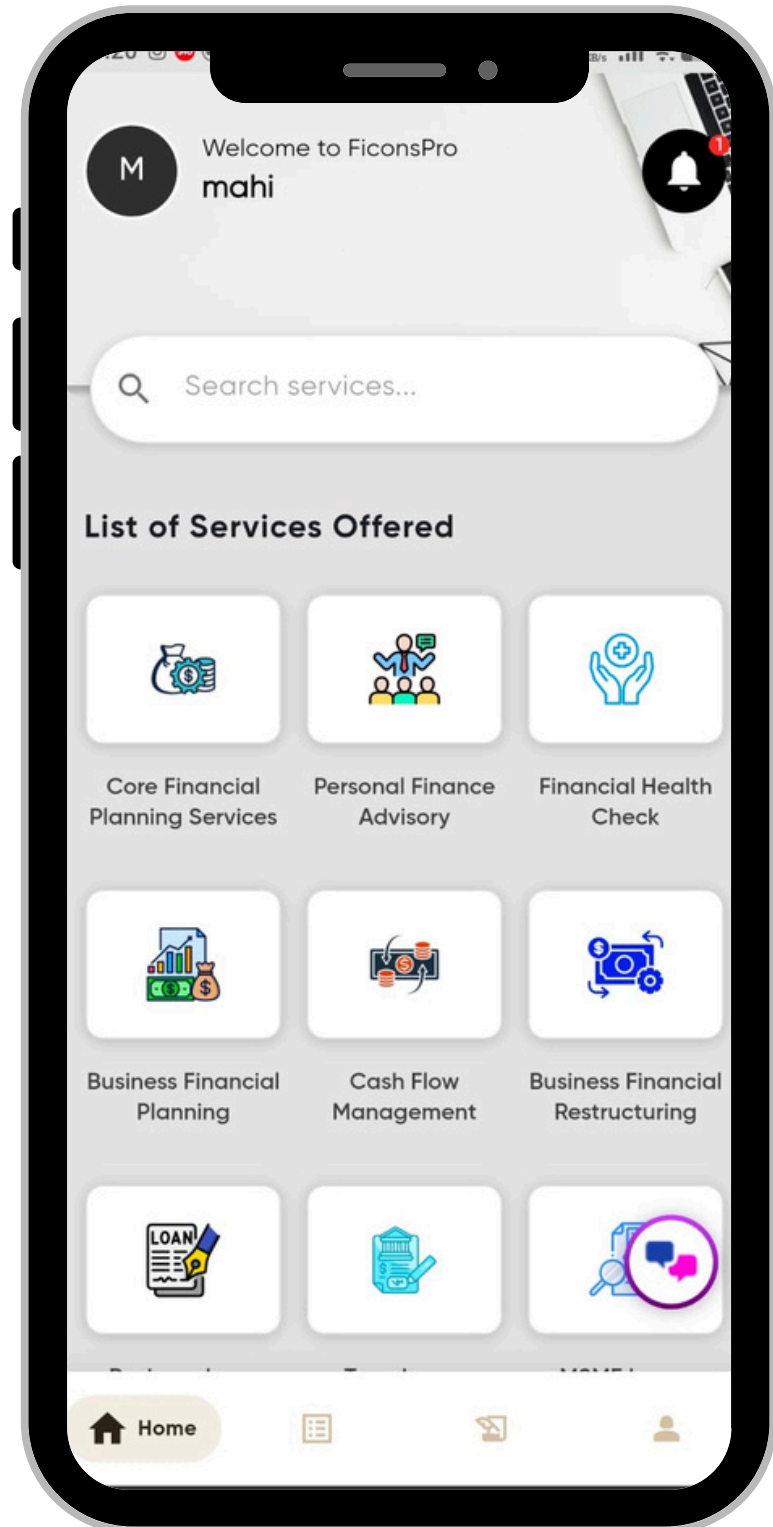
Corporate Finance Services

- Corporate Financial Planning
- Financial Restructuring
- Mergers & Acquisitions Advisory
- Capital Raising
- Corporate Valuation
- Due Diligence Support

Common Challenges

Financial consultants often struggle with:

- Managing multiple clients
- Tracking financial goals
- Manual follow-ups
- Document collection
- Loan processing delays
- Investment tracking
- Communication gaps
- Team coordination
- Billing management



The Complete Solution

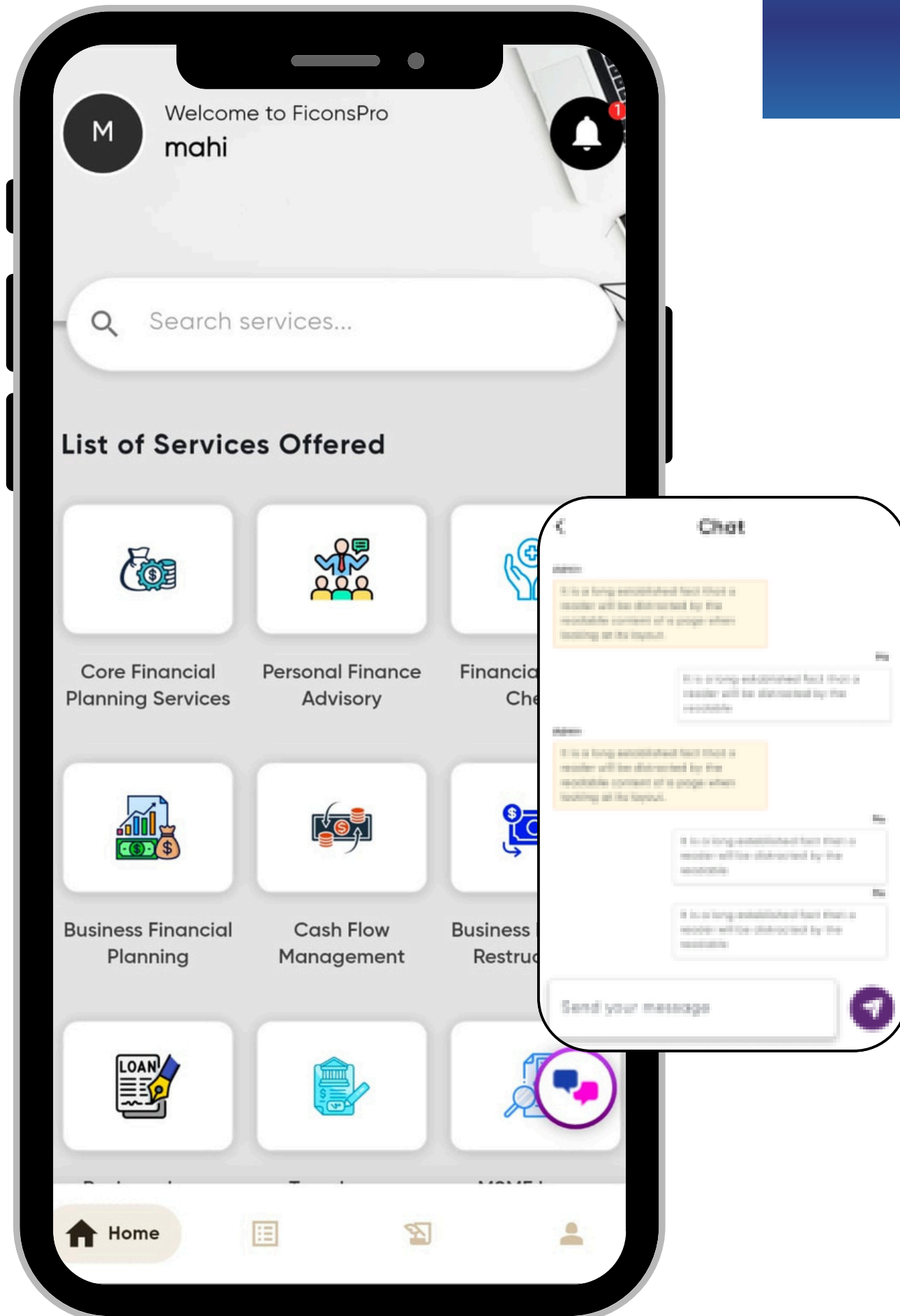
Finance Consultants Application helps manage

- ▶ Client Management
- ▶ Financial Advisory
- ▶ Business Finance
- ▶ Loan Processing
- ▶ Investment Management
- ▶ Startup Finance
- ▶ Corporate Finance
- ▶ Billing
- ▶ Reports
- ▶ Document Management
- ▶ Notifications
- ▶ Team Management

Everything in one platform.



Flexible Service Management



Configure services according to your business.

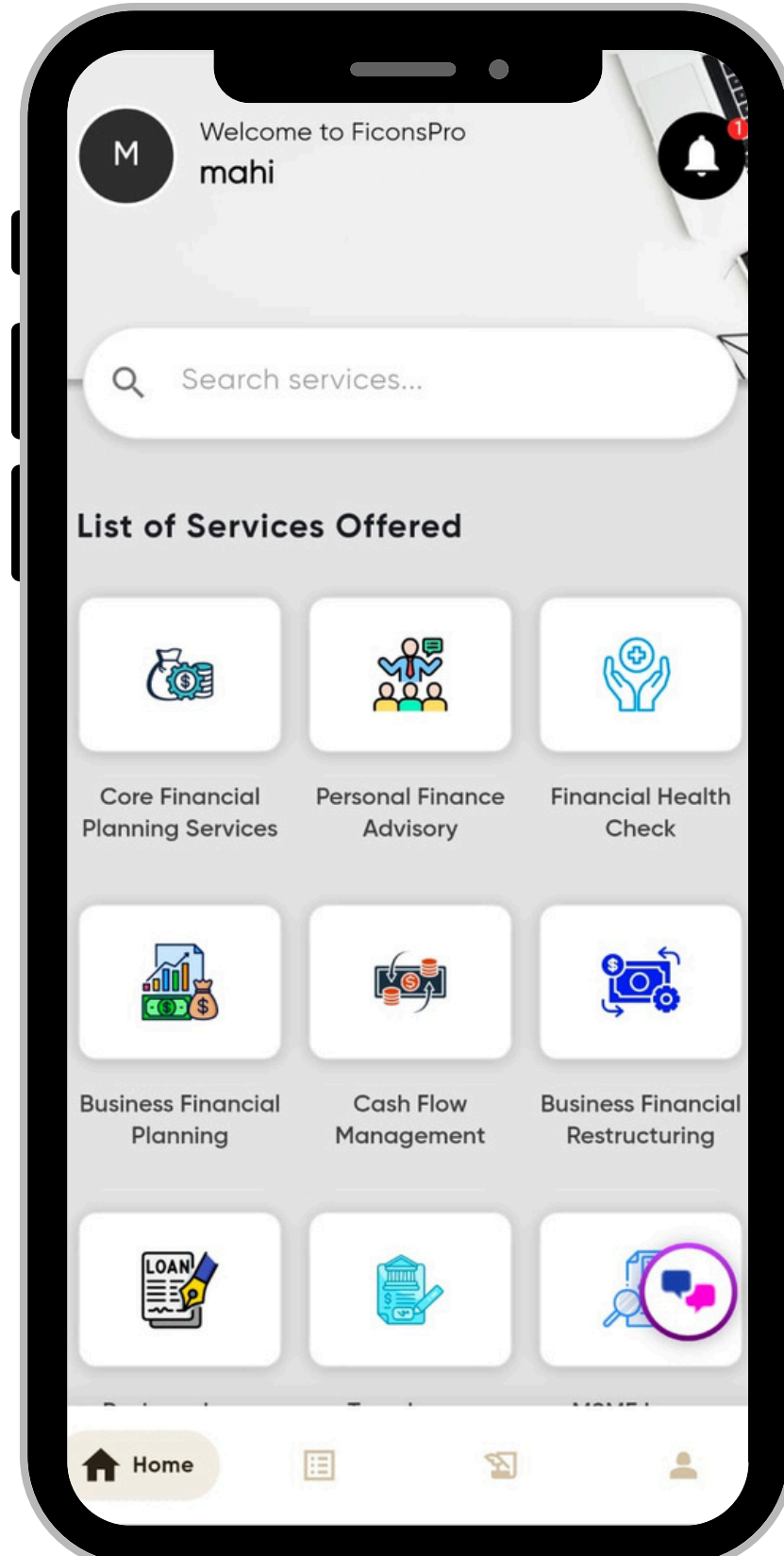
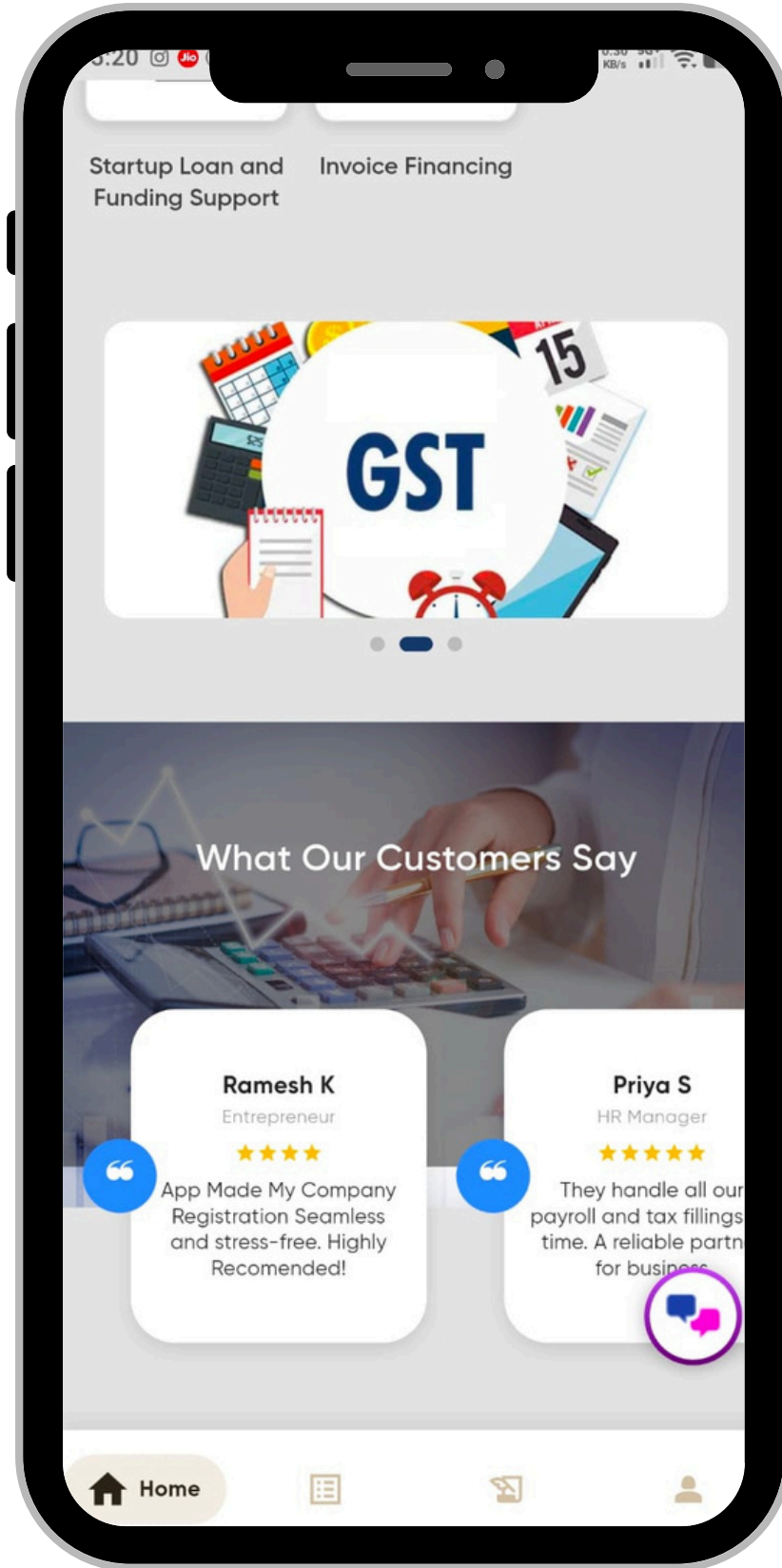
The platform supports flexible service configuration where firms can:

- Financial Planning
- Wealth Management
- Investment Advisory
- Mutual Fund Advisory

Commonly managed services include:

- Business Finance
- Loan Consultancy
- Startup Funding
- Corporate Finance
- Tax Planning

And many more based on your operations.



Web & Mobile Experience

Available on

- ▶ Web Portal
- ▶ Android App
- ▶ iOS App

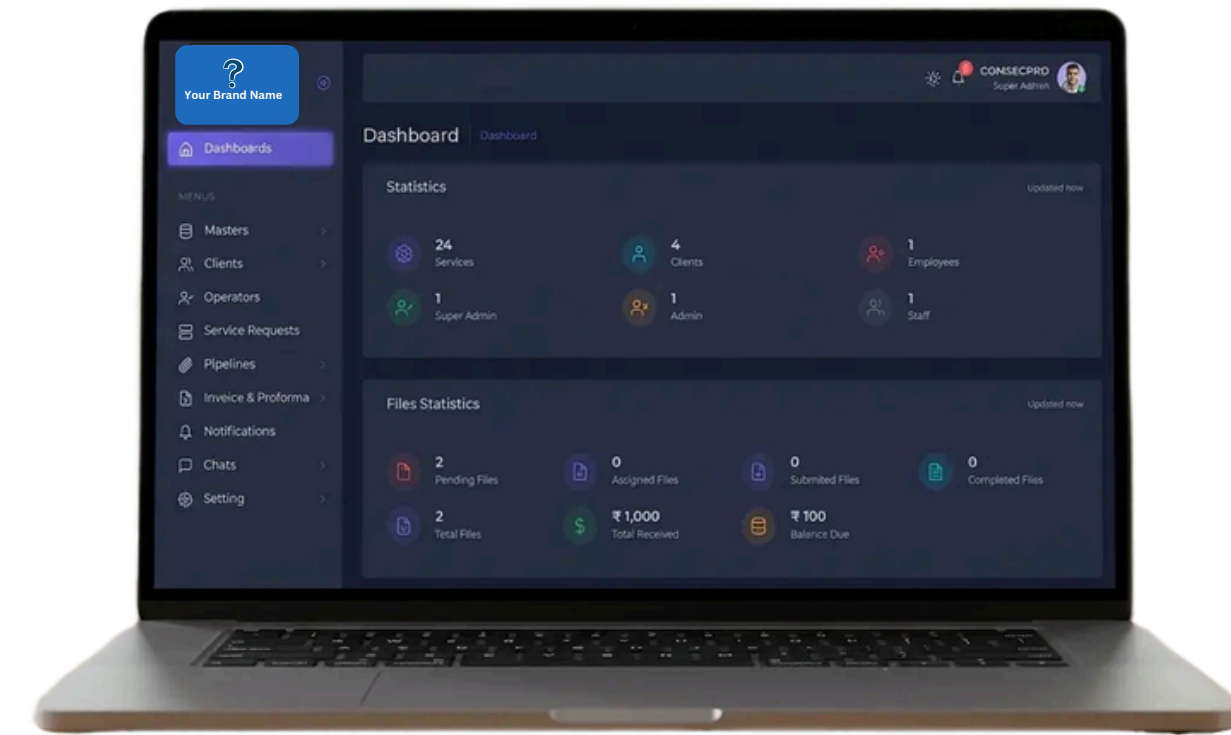
Mobile Applications

- ▶ Admin Dashboard
- ▶ Client Portal
- ▶ Staff Panel
- ▶ iOS App
- ▶ Reports
- ▶ Billing, Notifications
- ▶ Documents , Messaging

Your Own Branded Application

Launch under your own identity.

White-Label Branding



Own App Name

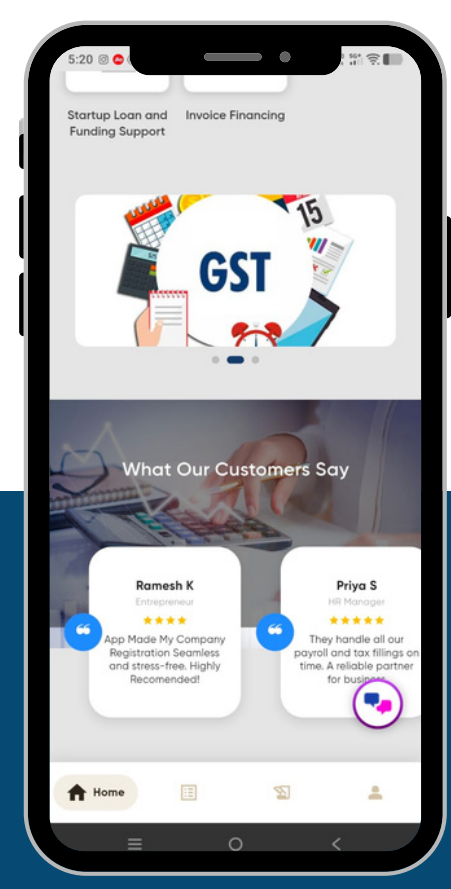
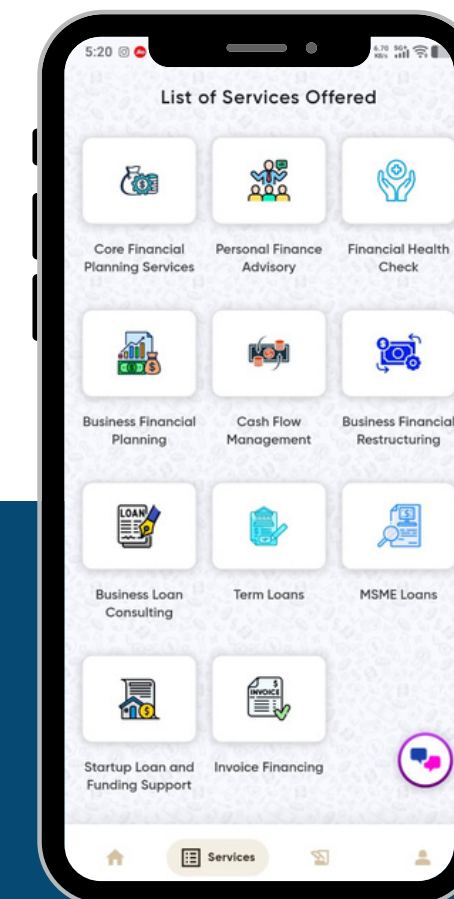
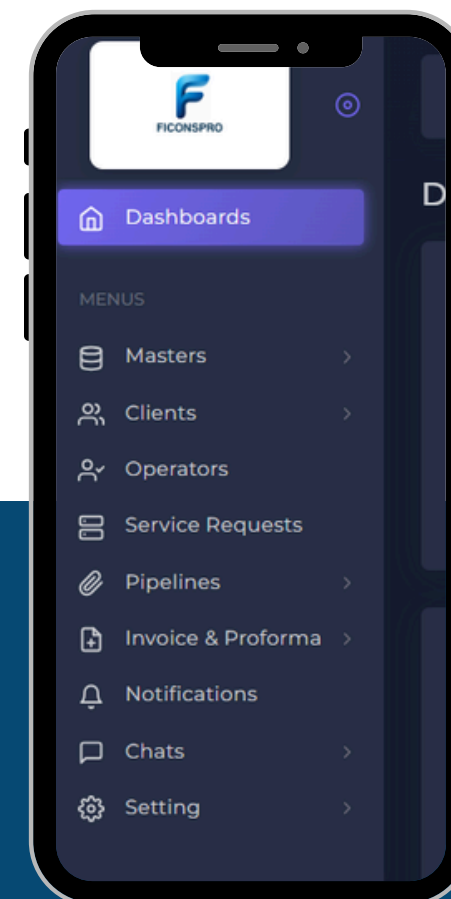
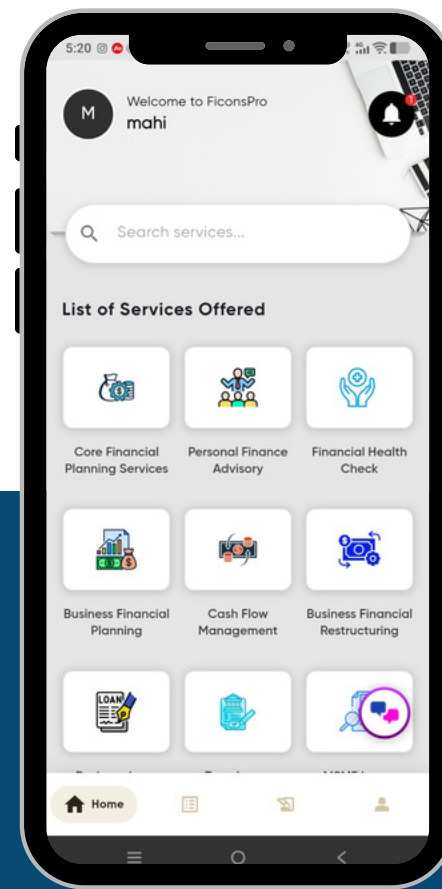
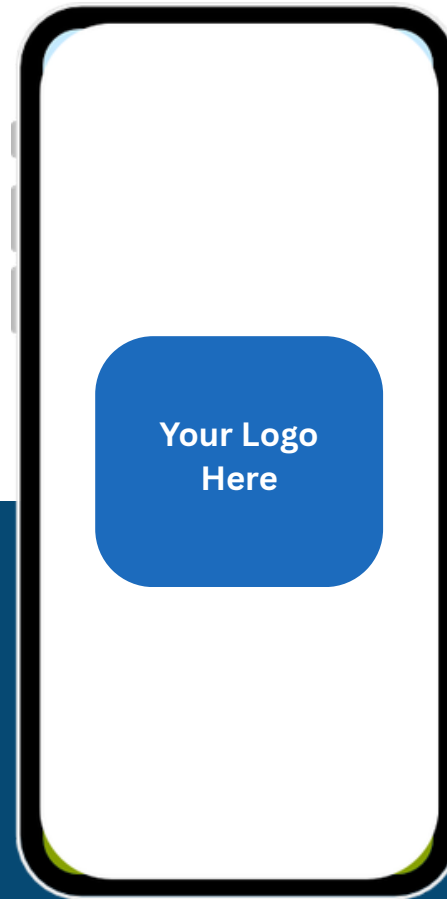
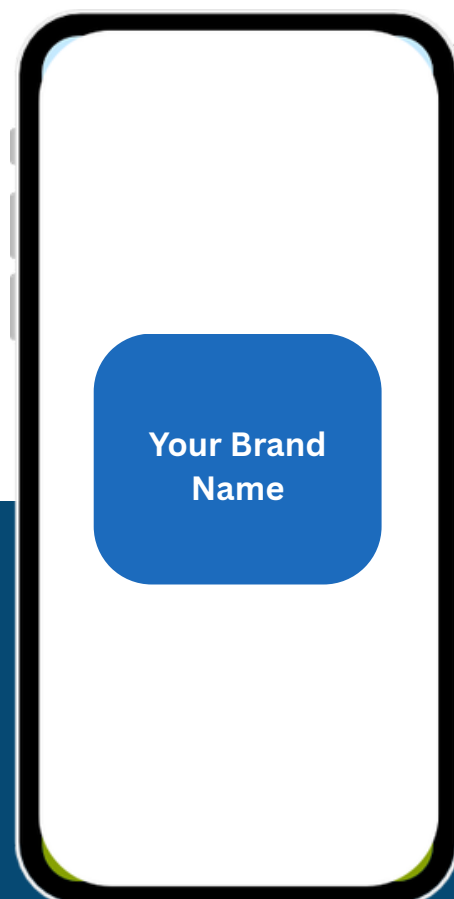
Own Logo

Own Brand Colors

Own Web Portal

Branded Android App

Branded iOS App



Your clients interact completely under your firm identity.

Strengthen Your Brand

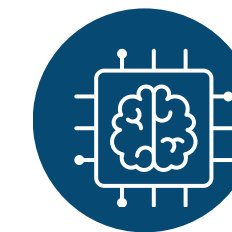
Build a Modern Digital Presence



Professional Digital Presence



Improved Client Trust



Better Customer Experience

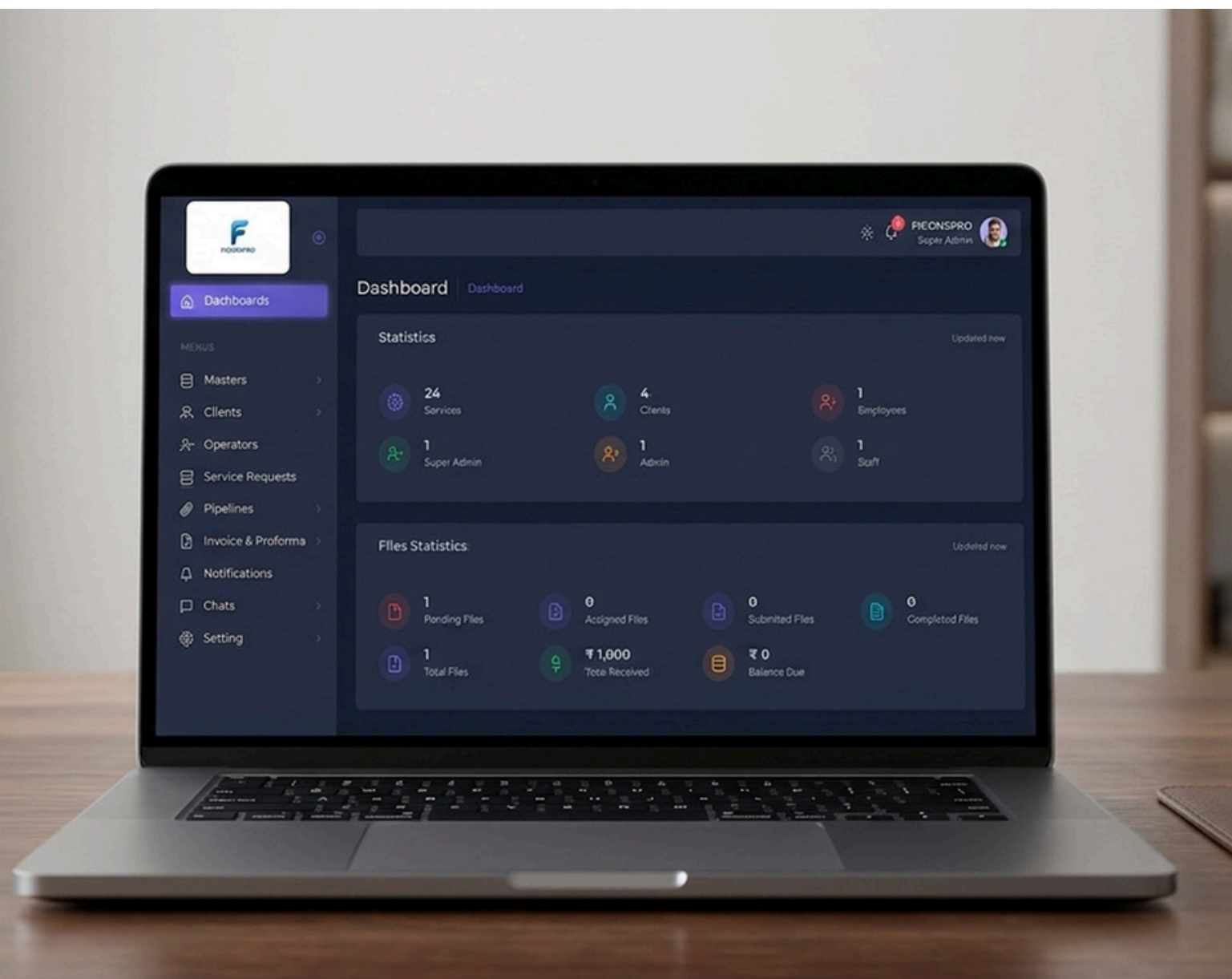


Modern Financial Services



Strong Brand Identity

A branded application enhances both operational efficiency and professional credibility.



Better Client Experience

Exceptional Client Experience



Book Consultations

Upload Documents

Receive Notifications

Track Financial Plans

Chat with Advisors

View Investment Status

A branded application enhances both operational efficiency and market perception.

Your Clients Will Love the Experience

AuditPro improves how clients interact with your firm through:

- Easy communication
- Chat-enabled interactions
- Faster document sharing
- Instant notifications
- Online payment convenience
- Mobile accessibility
- Service tracking transparency

Modern user experience helps improve:

- Client satisfaction
- Retention
- Repeat business
- Referral opportunities



Grow Your Business

Smart Financial Solutions

Access practical financial services designed for businesses of all sizes. From planning to funding, we help simplify complex financial decisions. Focus on growth while we support your financial journey.

- 01** Operational Efficiency
- 02** Customer Satisfaction
- 03** Client Retention
- 04 Revenue Growth
- 05** Team Productivity
- 06** Faster Response Times



Why Build From Scratch?

Avoid

Creating a business from the ground up requires the right financial strategy and expert guidance.

- High Development Costs
- Long Development Time
- Maintenance Expenses
- Technical Hiring
- Security Risks
- Continuous Updates
- App Store Management

Our ready platform saves time and money.



MODERN TECHNOLOGY EXPERIENCE

MODERN TECHNOLOGY EXPERIENCE

BUILT USING MODERN TECHNOLOGIES

Built using

- ▶ Laravel Framework
- ▶ Flutter
- ▶ React JS
- ▶ MariaDB / MySQL
- ▶ Cloud Infrastructure

This ensures:

- ▶ Better performance
- ▶ Smooth user experience
- ▶ Faster communication
- ▶ Reliable scalability
- ▶ Easy accessibility

Clients can easily:

- ▶ Chat
- ▶ Share files
- ▶ Make payments
- ▶ Receive notifications
- ▶ Track activities

through a seamless digital experience.



Smart Billing

the Smart Billing Support slide should focus on billing for consulting services, financial advisory, loans, investments, and subscriptions.

Flexible Billing Options

- Consultation Fee Billing
- Service-Based Billing
- Fixed Package Billing
- Subscription Plans
- Hourly Billing
- Project-Based Billing
- Milestone Billing
- Retainer Billing



Invoice & Payment Management

- Professional Invoice Generation
- GST-Compliant Invoicing
- Automatic Payment Reminders





Reports & Analytics

Gain valuable insights with real-time reports and analytics to make smarter business decisions.

- Client Activity
- Financial Performance
- Investment Reports
- Loan Status
- Revenue
- Team Productivity
- Pending Tasks
- Billing Reports

Customization & Additional Features

Customize features, workflows, and settings to match your unique business requirements and processes.

- Client communication
- Work allocation
- Billing & payments
- Follow-ups
- Notifications
- Document handling



★ Adapt the system to fit your business needs with flexible features and personalized settings.

Enterprise Security



Security & Data Protection

Enterprise - Level Security

Each client receives:

- ▶ SSL Encryption
- ▶ Dedicated Database
- ▶ Separate Database
- ▶ Daily Backup
- ▶ Firewall Protection
- ▶ Access Control
- ▶ Role-Based Access
- ▶ Secure Login
- ▶ Data Encryption

No shared hosting or public data access.

Data privacy and professional confidentiality are highly prioritized.



Data Privacy & Confidentiality

Security First Approach

- ▶ Dedicated isolated hosting
- ▶ No shared database between firms
- ▶ Role-based access control
- ▶ Controlled employee access
- ▶ Secure login authentication
- ▶ Encrypted data handling
- ▶ NDA support available

Your client data remains fully under your control.



Cloud Infrastructure

Secure & Scalable Hosting

Hosted using:

- ▶ AWS
- ▶ Google Cloud Platform
- ▶ Microsoft Azure

Benefits:

- ▶ Better performance
- ▶ Scalability
- ▶ Reliability
- ▶ Data protection
- ▶ Upgrade flexibility

Infrastructure can be scaled anytime based on operational growth.

Implementation Timeline

Quick Deployment Process

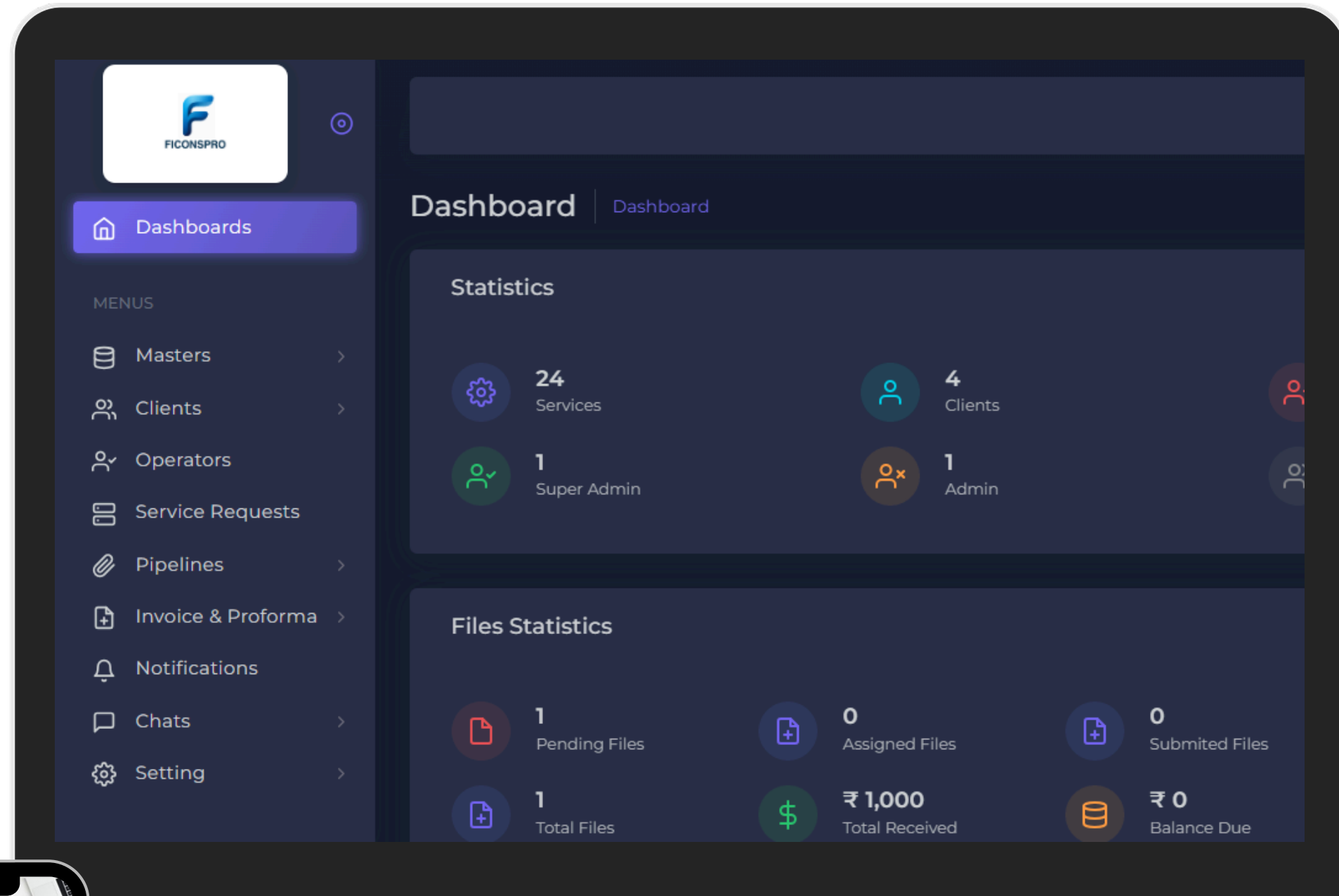
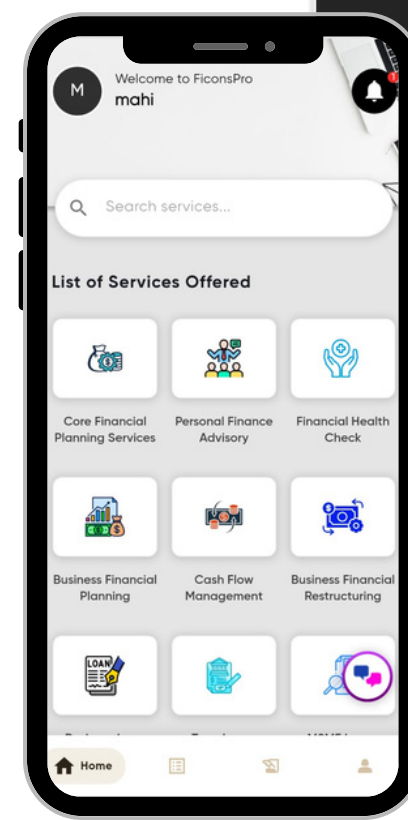
Within 3–5 Working Days

- Branded Web Application Deployment
- Admin Panel Configuration
- Initial Setup & Branding
- Android APK for Testing
- iOS TestFlight Access

Mobile App Approval

Typically:

- **7–15 days**
- Based on Play Store / App Store review timelines



Continuous Improvements

Continuous Product Evolution

AuditPro is continuously improved with:

- 1 Operational enhancements
- 2 Workflow optimizations
- 3 Security updates
- 4 Performance improvements
- 5 Industry-driven feature updates

General updates are included as part of ongoing product support.



Support & Scalability

Built for Long-Term Growth

- Ongoing technical support
- Priority support options
- Server scalability
- Storage upgrades
- Additional feature development
- Future expansion support

Designed to grow along with your firm operations.



Finance Consultants application by **Amrithaa**



(Amudhalakshmi Systems Private Limited)

Providing technology solutions since 2005.

You Are in Safe Hands

Finance Consultants Application is built to help finance professionals digitize their complete advisory operations.

Our mission is to simplify financial consulting with modern technology, automation, and secure client management.

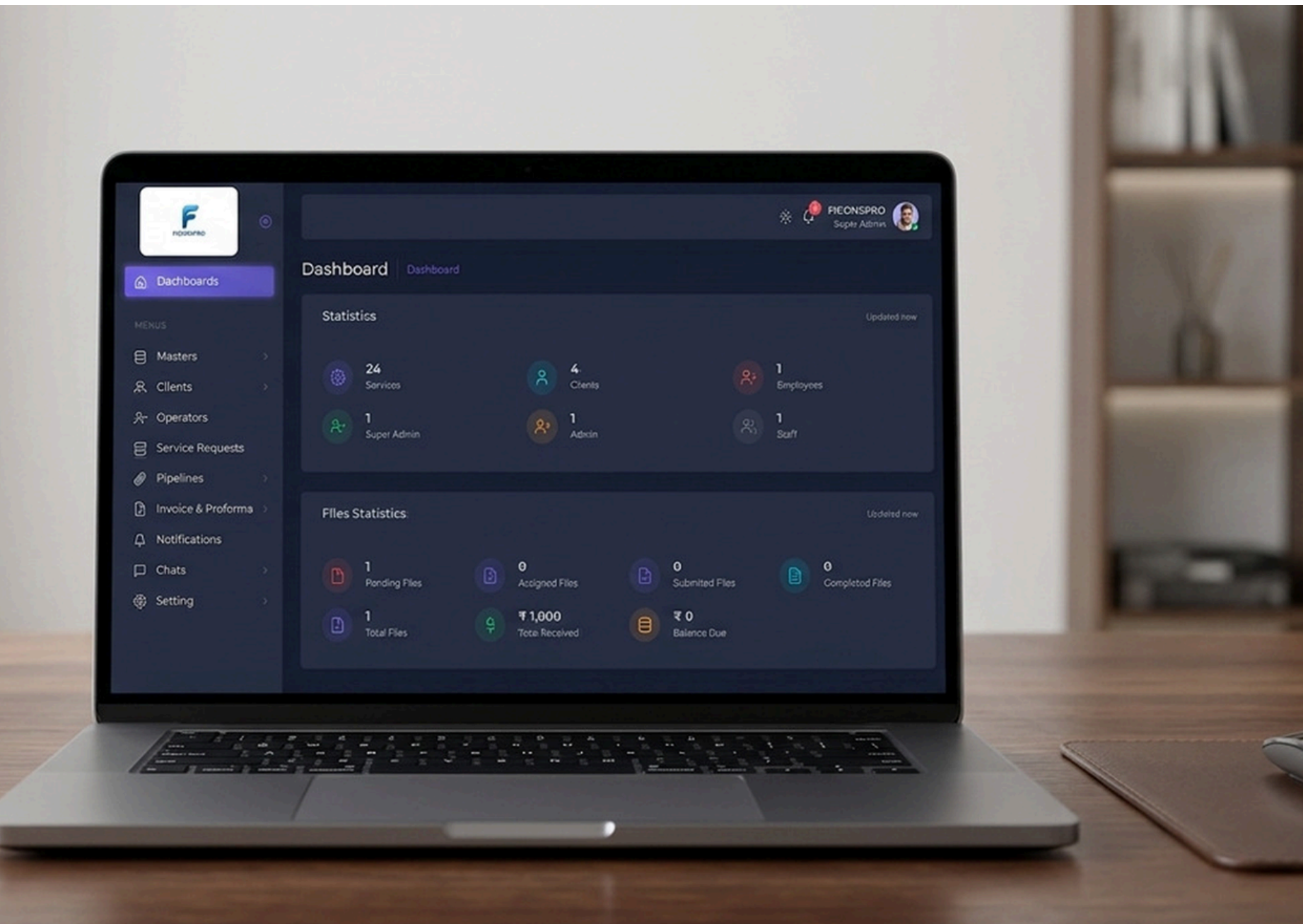
With years of experience in:

- 01 Software Development
- 02 Business Applications
- 03 Web & Mobile Solutions
- 04 Cloud Infrastructure
- 05 Enterprise Technology Services

AuditPro is built with a long-term vision focused on:

- 01 Stability
- 02 Scalability
- 03 Security
- 04 Continuous product improvements

Why Choose Finance Consultants Application?



Key Benefits

- ▶ Ready-to-use platform
- ▶ Faster implementation
- ▶ Lower operational overhead
- ▶ Own branded application
- ▶ Centralized management
- ▶ Better client engagement
- ▶ Reduced manual follow-up
- ▶ Scalable infrastructure
- ▶ Continuous improvements

Trusted financial expertise and smart solutions to help your business grow with confidence.

Reach Us

Contact Us



Live Demo



Pricing Discussion



Customization Consultation

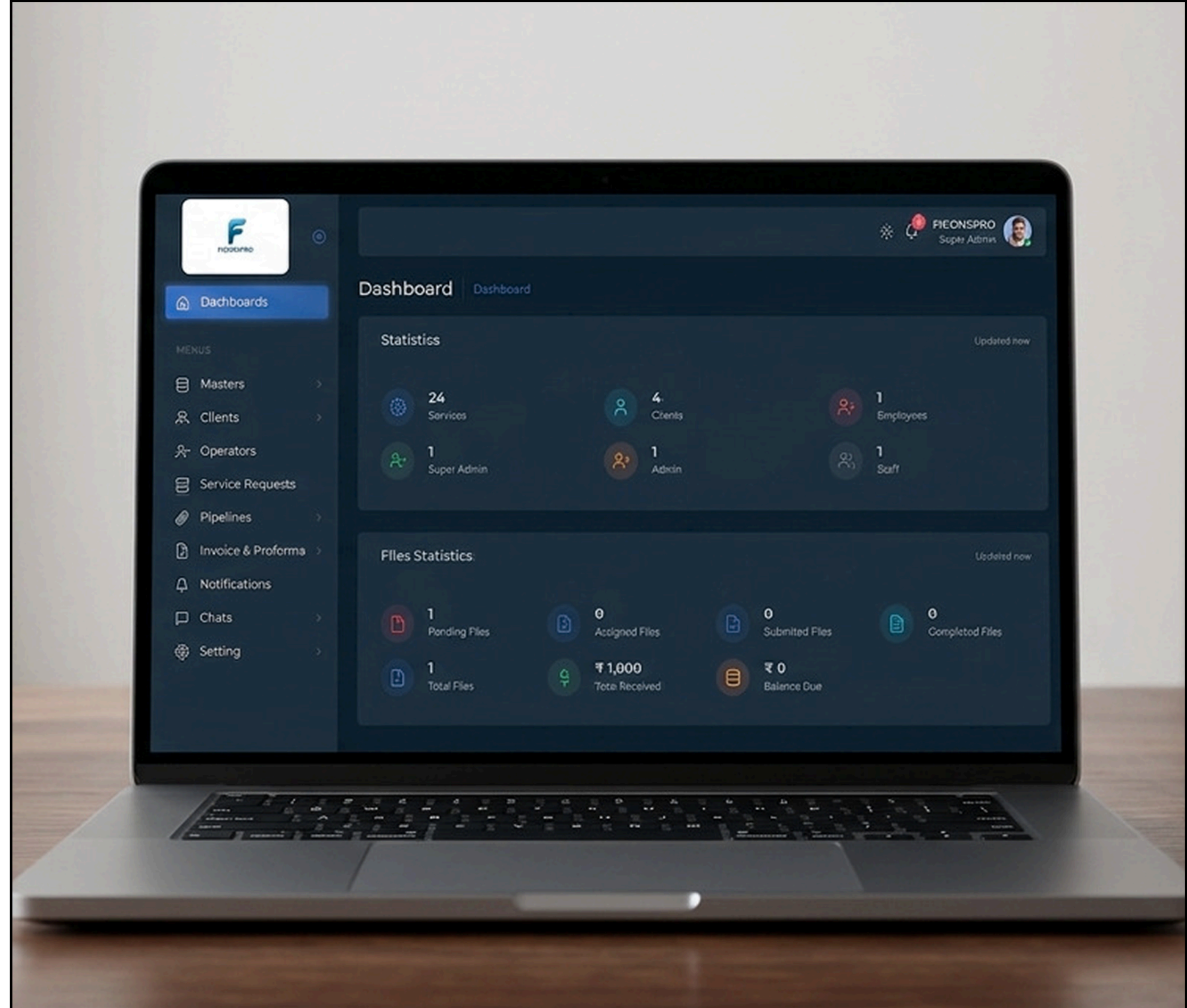


Partnership Opportunities

Website



Powered by Amrithaa



Thank you

Empowering Audit Firms Through Digital
Transformation.



Finance Consultants application

Smart Practice Management Platform