wecomplement

Back-Office Consulting Service

The We Complement Back-Office Consulting Service

Looking for a fresh start?

Does your back-office system, and related technology, seamlessly align with the needs of your business, clients, and Consumer Duty requirements? If not, you have come to the right place.

As financial planning professionals, we understand the fine balance that firms need to walk when considering their client relationships, regulatory requirements, and technological priorities. This ensures we select, and implement, the right system and processes for each individual firm.

Our team are continually reviewing and researching the back-office system market, sparing you the need to do so. Our research is based on criteria that our clients have identified as essential, such as:

- **Client Portal**
- **Management Information Reports**
- **Document Sharing**
- **Income Reconciliation**
- **Electronic Statements**
- **Personalised Templates**
- **Training and Support**
- **Third-Party Integrations**

Looking to improve the performance of your current system?

Does your current system feel flat, just not working for you, clunky even? If so, we can help you fine tune your system to meet your bespoke needs, e.g.

- Income Reconciliation – setup, training, holiday cover etc.
- Workflows – creation and implementation
- Data Migration

Once fixed, we provide detailed process notes and training to allow your team to operate effectively without our involvement. We can be on hand in the background to offer additional support and guidance, if needed. However, our aim is for you to be self-sufficient.

Here are some of the systems we have researched:

Xplan	Advice Objects	Assyst	Durrell	Plan Happy	Adviser Cloud

Wealth Craft	Curo	Finplan	Intelliflo

The pricing is subject to your specific requirements, but we consistently strive to remain competitive. Our service is custom-tailored to meet your unique needs.

Contact

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