

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.



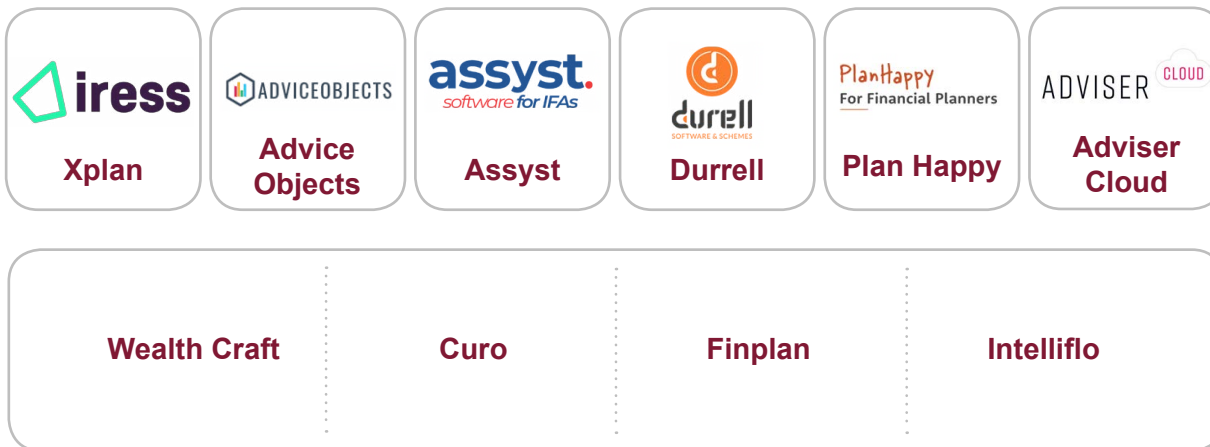
Workflows – creation and implementation



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:



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

 Old Brewery Business Centre, Castle Eden,
County Durham, TS27 4SU.

 +44 (0)1472 728 030

 hello@wecomplement.co.uk

 Wecomplement.co.uk