Client Management

The We Complement Client Management Service

Embracing flexibility and remote collaboration, our team is positioned to provide adaptable support tailored to the unique needs of your business.

Our primary mission is to elevate your operational efficiency, ultimately saving you precious time and resources. By taking charge of all client-related tasks, we seamlessly guide the client journey, empowering you to concentrate on fostering client relationships and expanding your business. Whether you seek integration with your existing team or a comprehensive outsourced solution, our services are meticulously tailored to align with your specific requirements.

Key Features of Our Client Management Service:

One Ongoing Monthly Payment

Ensure continuous support for your existing clients throughout the year with a single monthly payment.

Transparent Fee Structure

Our fees are calculated on a monthly cost-per-client basis, typically ranging from £50 to £85 per client per month, depending on your specific needs.

New Business Support

Explore our fixed fees menu for handling new business for your existing clients, with potential additional discounts for our client management partners.

One-Off Setup Fee

Experience seamless onboarding with a one-time setup fee of £1000 + VAT. This fee encompasses the comprehensive work we perform behind the scenes, such as creating tailored process guides, collaborating with internal staff, and establishing efficient workflows.

Scalability Solutions

Considering growth? We offer a new client onboarding service at a fixed price per client undergoing your customized onboarding process.

Pre-Meeting Assistance

- Full diary management and client meeting scheduling.
- Compliance check and file updates.
- Client information updates.
- Vulnerability assessment.
- Policy values and transaction history updates.
- Portfolio report and performance summary preparation.
- Discussion points and confirmation of unused allowances.

Post-Meeting Support

- Back office update post-client meeting.
- Implementation of post-meeting tasks.
- Retrieval of the latest MiFID cost & charges statement.
- Crafting confirmed suitability reports for clients.
- Issuing suitability reports, including fund switches and rebalancing.
- Back office and portal maintenance.
- Platform management and email inbox organization.

How It Works:

Initial Discussion: Connect with us for an in-depth conversation. Share your challenges, and we'll identify how we can bring value to your business.

Onboarding Meeting: We present you with a tailored onboarding process, showcasing the value we bring to your operations.

Implementation: We estimate a smooth onboarding period of 4 to 5 weeks, tailored to your firm's requirements and procedures.

Ready to enhance your client management experience? Schedule a meeting with us to discuss your firm's unique requirements. We look forward to supporting your success!

Contact

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