

Suitability Templates





Clear Concise and Comprehensive: The We Complement Suitability Templates

Our templates empower advisers to compose suitability reports that resonate with their clients, ensuring readability and comprehension.

In alignment with the FCA consumer duty FG22/5, section 1.9, we prioritise effective communication and engagement with your clients. Our goal is to facilitate their ability to make informed decisions about financial products and services, taking responsibility for their actions.

Beyond consumer duty compliance, our user-friendly templates are created using Word, and streamline the report-writing process, potentially reducing the time required by an average of 25%, contributing to an enhanced bottom line.



Key Features of Our Templates:



Branded and Bespoke: Tailored to reflect your firm's identity.



Compatibility: Created using Word and easily integrated into most backoffice systems.



Ongoing Support: We Complement provides continuous assistance to keep your templates up to date.



Consumer-Centric Design: Crafted with the consumer in mind, promoting transparency and clarity.



Template Design and Approval



We have a detailed discussion with our team, for us to understand exactly what you require.



You provide us with your branding pack.



We agree an initial format.



We create bespoke documents tailored to your needs, whether it's a single report or a full We collaborate with your compliance team.



We upload your consumer duty ready templates and appendices to your SharePoint folder.



We provide a training and process document for your team.



We will then maintain your templates for a whole year, ensuring they are always up to date and compliant.




Packages start from £2,950 +VAT

Utilise our templates and enjoy a 10% reduction on our standard fixed fee paraplanning services.



Contact

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

 +44 (0)1472 728 030

 hello@wecomplement.co.uk

 Wecomplement.co.uk