# Your annual reviews. Taken care of.

You meet with your clients. We handle the admin and paraplanning — turning review prep into clarity, and following up after.

Choose the review tasks you need help with, from meeting preparation to agreed follow-up.

SUPPORT AROUND YOUR REVIEW

01 **We prepare.**

02 **You advise.**

03 **We follow up.**

# You lead the review meeting.

We prepare the information and handle the follow-up, using the review process agreed with you — including flagging recorded vulnerabilities for your review, so Consumer Duty is built in from the start.

01 / WE COMPLEMENT

## Before the review

- Book meetings, if required.
- Identify and follow up missing client information.
- Request provider details and current valuations.
- Prepare portfolio summaries and meeting agendas.
- Flag recorded vulnerabilities for the adviser to review.

02 / ADVISER

## Adviser meeting

- Review the client's circumstances and needs.
- Approve the advice, reports and instructions.
- Keep the client relationship.

03 / WE COMPLEMENT

## After the review

- Add meeting notes and update client records.
- Follow up agreed actions with providers and clients.
- Prepare annual review reports for adviser approval.
- Send approved documents and follow up client responses.
- Process approved changes and update the back-office system.

WORKING ALONGSIDE YOU

# Support for your whole review team.

We work alongside your advisers, paraplanners and administrators, taking on the review tasks you agree with us.

"We Complement feel like an extension of our own team rather than an external provider."

**Glenn Brophy**
Director, Integrity Financial Management Limited

CLIENT FEEDBACK ON WORKING WITH WE COMPLEMENT

### Busy review periods

Help with preparation and follow-up when several reviews are due at the same time.

### Provider follow-up

Requests and follow-ups for the information needed to prepare each review.

### A shared review workload

Additional capacity for agreed tasks across the review process, alongside your existing team.

### After-meeting backlogs

Help with agreed actions, annual review reports and client record updates.

### Recruitment and staff leave

Support while you recruit or cover staff absences.

### A growing client bank

Agree additional support as client numbers and review volumes increase.

# Your systems.
# Your templates.
# Your process.

We work with the systems and templates your team already uses, following the review process agreed with you.

### A named contact

Your main contact gets to know your team and coordinates the review work we handle for you.

### A coordinated team

Administrators, paraplanners and senior technical colleagues work together on the support agreed with your firm.

### A second pair of eyes

Technical work and suitability reports are checked by a second colleague before they leave us.

### Keeping client data secure

We Complement is ISO 27001 certified. We use secure processes to handle your clients' information.

**You remain in charge.** You approve the advice and reports. We handle the agreed support tasks.

we complement

PEOPLE
SUPPORTING
PEOPLE

NEXT STEPS

# Let's talk about your review workload.

Tell us how many reviews you expect, where the pressure sits, and which parts of the process you'd like us to take on.


**Amy North**

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SIMPLE PRICING

# Clear hourly rates.

Support to suit your workload. We agree the review tasks with you.

ADMIN & SERVICING

**£55** + VAT / hour

Review preparation, provider requests, record updates and follow-up administration.

PARAPLANNING & TECHNICAL

**£75** + VAT / hour

Research and annual review reports, including suitability documentation.

We're flexible in how involved we are, from single tasks to a full review service. Once we know the support you need, we can agree a fixed per-client cost, or a monthly fee based on the number of clients you expect us to support across the year, helping you budget with confidence.