

Focus on your customers

by outsourcing admin to our paraplanning team

Do right by your customers and grow your business — we'll take care of the paperwork.

We understand the connection between providing an exemplary customer experience and growing customer relationships in order to retain loyalty. But in order to do this you need time to focus on what matters rather than admin tasks. While you can't outsource your regulatory responsibilities, we can make life easier through our paraplanning suitability report writing service.

We've been reviewing suitability for two decades, so you can trust we know what good looks like.

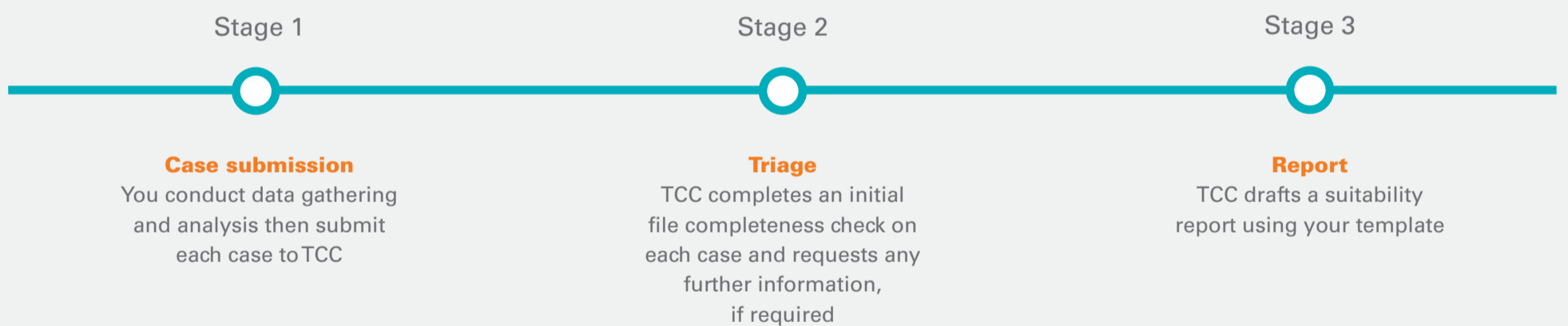
We scale and flex to meet fluctuating demand!



What we do

We work as an extension of your existing paraplanning team, taking on responsibilities in line with your needs. We use our insight and expertise to create suitability reports for a range of complex products, and can also cover your other paraplanning requirements.

Best of all, our paraplanning team is completely in-house, locked down and quality assured. So, you can be sure of quality and service consistency.



How we do it better



In-house resource

We're always here. You'll have continual access to readily available experienced paraplanning resource.



Flexibility

We provide an adaptable outsourced solution that helps you meet fluctuating business demands.



Compliance expertise

We're the experts in file checking and suitability, so you can reduce the risk of unsuitability and regulatory trouble.