



PARA-SOLS
Paraplanning Solutions

PARA-SOLS. RANGE OF SERVICES
{ Flexible Paraplanning. Built with you in mind }



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Contents

| | |
|-------------------------|---------|
| Introduction | page 03 |
| About Us | page 04 |
| What Makes Us Different | page 05 |
| Key Staff | page 06 |
| How We Work | page 07 |
| Our Hubs | page 08 |
| Benefits | page 09 |
| Rise Platform | page 10 |
| Our Promise | page 11 |



PARA-SOLS

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Para-Sols is a specialist provider of flexible, timely and professional Paraplanning and administrative support services. Our high quality, compliant reports will free up time to focus on your business - nurturing client relationships and improving overall profitability.

We act as an integrated member of your team, using a structured and transparent process to ensure your reports are delivered seamlessly, within agreed timescales.

ABOUT PARA-SOLS

Para-Sols was established in June 2009 when the founder, Cathi Harrison, decided to set up a bespoke Paraplanning and report writing service. From the outset the firm has supported forward thinking financial advisers who recognise the benefits of outsourcing to profitably grow their businesses.

Today Para-Sols employs a focused team, working from offices in Darlington and Leeds, supporting the needs of advisers across the UK. Each Paraplanner is highly qualified and committed to ongoing professional development.

Cathi's vision is for the firm to be recognised nationally, as the leading Support Services provider to financial advisers. This will be achieved by:

- » Growing the team through the pioneering Paraplanning Training Academy;
- » Transitioning assets through the Legacy Evaluation, Analysis & Paraplanning (LEAP™) service;
- » Further developing the RISE™ proprietary case management system; and
- » Launching additional support functions.



WHAT MAKES US DIFFERENT?

Para-Sols provide a completely outsourced Paraplanning and administrative support service. We take time to truly understand your business, value proposition, and investment offering, then create bespoke reports customised to your business and client requirements.

Our primary objective is to provide a simple yet professional service, delivered in a friendly and approachable way. You will have complete transparency of costs, timescales and individual report status via our proprietary RISE™ platform.

We take away the administrative burden in your business; freeing up your time to focus on your clients, while also improving scalability and profitability. Tapping into the skills of our specialist team could also enable you to hire more generalist support staff at a lower cost to your practice.

The entire Para-Sols team will work in genuine partnership with you, providing guidance, advice and best practice principles from firms across the profession.

KEY STAFF



Cathi Harrison
Director

Cathi is the founder and owner of Para-Sols; she has been in financial services since leaving university and holds both the Chartered and Certified Financial Planner status as well as being a Fellow of the Personal Finance Society. Cathi splits her time between the two offices, supporting her team and clients and managing the strategy for Para-Sols.



Jo Campbell DipPFS
Senior Paraplanner

Jo has been with Para-Sols since 2010 being our first full time employee. As well as paraplanning, and studying for her Certified Financial Planner status, her role includes managing the Darlington office. She is always available to discuss cases with advisers and to chat through ideas.



Kim Binks
Client Relationship Manager

Kim is our Client Relationship Manager, who deals day to day with our existing and new clients to make sure everything is running smoothly and our advisers are getting the most out of Para-Sols. She came into a career in financial services after graduating with a degree in Accounts & Finance.



HOW WE WORK

Working with an outsourced provider can often feel like two separate businesses pulling in different directions. At Para-Sols we work hard to integrate with your team. Our Paraplanners and administrators work seamlessly alongside your advisers and support staff - helping you to grow your business, at a lower cost over the long-term.



OUR HUBS

As Para-Sols has grown, we have focused on maintaining the close relationships with our clients that we have nurtured over the years. To do this, we have created hubs and each client is assigned to a hub.

This means, rather than regularly deal with different Para-Sols team members, you will consistently deal with the same hub members and they will get to know you, your company and your preferences.

All of our hubs are overseen by Cathi Harrison, Director.

As a Fellow of the Personal Financial Society, a Certified Financial Planner and holding Occupational Pension qualifications, Cathi also oversees any particularly complex cases.

BENEFITS OF WORKING WITH US

- » More time to spend with your clients and focus on your business
- » Full access to a team of qualified and highly experienced Paraplanners
- » Improved business efficiency, with high quality reports delivered within agreed timescales
- » Much lower costs when compared to hiring an in-house Paraplanner
- » All case fees are known upfront, so you can include these in discussions with your clients
- » Fixed fees (vs. hourly rates) ensures we focus on quality - rather than time spent
- » We restrict the number of firms we work with to maintain our service standards
- » Full transparency on case status via our proprietary RISE™ platform



PARA-SOLS RISE™ PLATFORM

After a number of years' working within the constraints of market leading project management systems, we decided to build our own.

The Para-Sols RISE™ platform is a proprietary system our programmers created specifically to support our case submission process.

Submitting cases through the site is simple and provides you with complete transparency on the status of your reports and the associated costs.



OUR PROMISE TO YOU

Our goal is to help you to make your business as efficient as possible; so you will have more time to focus on client engagement, growth and profitability.

Through working with us, we want you to feel:

- » **Confident** in us, our expertise, professionalism and ability to deliver against your objectives
- » **Relaxed** about your cases and workload, knowing they are in capable hands
- » **Happy** that you are saving time and money over the longer-term
- » **Supported** knowing you have an additional team and efficient resources available to you

While we pride ourselves on our experience, we always strive to improve our service further. If there is any particular area of support we can assist with, or any service we're not currently offering which would help you, then please do let us know!

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