

para-sols
paraplanning solutions

Flexible Paraplanning.
Built with you in mind.



We can't get more hours in the day, so wouldn't it be great if, instead, the hours you do have could be spent doing the things you want to do, instead of the things you have to do?

In business terms, time is money, so with a company mission to make the lives of our clients easier, we pride ourselves on designing and delivering services where the primary focus is freeing up your time so you can concentrate on your business, nurturing client relationships and, ultimately, improving your overall profitability.



Cathi Harrison

Who are we?

Para-Sols was established in June 2009 by Founder & Director, Cathi Harrison, who 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 dedicated team of paraplanners and technical researchers, working from our office in Darlington, who are all committed to ongoing professional development through their own individual career plans.

We currently work with over 100 firms nationwide, of all shapes and sizes. We provide a flexible service to accommodate a wide variety of firms and their individual needs by adapting the way we work to fit the processes you already have in place.

Para-Sols' vision is to be recognised nationally, as the leading support services provider to financial advisers. We strive to achieve this by constantly looking to the future, embracing new technology, growing the team through our widely recognised trainee programme; The Grad Scheme, and listening to suggestions from our loyal clients.



What makes us different?

Our ultimate goal is simple – to give great service to our clients, lead the industry in innovation and service redesign and have some fun whilst doing it. As a company, we have identified a few qualities we think makes us stand out from the crowd, what we call our three uniques;

- 1. Office based
- 2. Rise™
- 3. Turnaround times

All of our staff are full time employees working out of our office in Darlington, meaning there is always someone at the end of the phone to talk to during office hours. It also means we can truly work as a team. When you come on board as a client, you are allocated a ‘hub’, ensuring that as we grow, your relationship with your paraplanners remains uninterrupted. It’s imperative to us that you feel supported and that we build a partnership which is based on trust and assurance.

We’ve built a bespoke project management system, allowing you to easily upload, and track, your projects, as well as communicate with the team at the touch of a button.

The system is intuitive and simple to use, and fully transparent so you can see exactly what stage your cases are at, every step of the way. It also facilitates secure document sharing and invoice management, so you can do everything in one place.

Over the years we’ve focused on streamlining our processes so that we can have full cases back to you within 5 working days from receipt of information.

Paraplanning cases are first assigned to our skilled admin team and then on to one of your dedicated paraplanners for the research and report writing stages, meaning we get projects back to you in a timely and efficient manner.

Why work with us?

Simple to use project management system allowing full transparency on cases

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

Personalised and bespoke reports, covering off all areas of financial planning

More than just report writing. Cases can include admin, research and discussing ideas with your paraplanner

Much lower costs when compared to hiring in-house

All case fees are known upfront, so you can include these in discussions with your client

Fixed fees (instead of 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

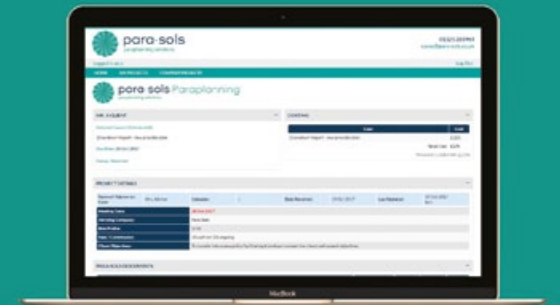
How will we work together?

Our services are designed to be flexible and bespoke, allowing you to choose as much or as little support as you need. To facilitate this, we manage all projects on our bespoke Rise™ project management system; after a number of years working within the constraints of off-the-shelf project systems we decided to embrace our love of technology and build our own!

With 24 hour access to the system, you can submit a case at any time from anywhere. Simply log in, tell us a bit about the client and choose exactly what part of the process you need us to do. Using the system is quick and simple, and allows you to see which members of the team are working on your case, when it's due back and what stage of the process it's at.

You also use the system to send us any necessary documents on a case (factfind, risk profiler, data already obtained on existing plans etc.) For document sharing and research, we are happy to tap into any of your existing back-office systems, alternatively they can be uploaded to Rise™ - whichever way suits you and your business most.

To view a short video and see the systems key features, visit www.para-sols.co.uk/our-solutions. To get you up and running, we offer short webinars to show you just how easy it is for anyone in the team to submit and track cases – email kim@para-sols.co.uk to book yours in.



We like to talk

We believe that successful partnerships start with a chat. Have a workflow challenge or looking for new ways to make your business more efficient?

Talk it through with us. We'd love to help.

Kim Binks

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