

Testimonials we have had from our clients (IFA Partners).

“When we first became aware of CAT, we were fast approaching the world of RDR. At the time we felt we were well ahead of the curve as far as delivering a clear proposition that offered value for money. However, CAT delivered this to a much greater extent. It built a much closer relationship with the clients that engaged with it. The fact that they were being contacted every month electronically as well as their annual review gave them a considerable amount of confidence in the process. We have had 100% retention from the clients that signed up for it and a significant amount of referrals. We monitor where all of our new clients come from and it is a greater percentage of CAT clients that refer. Our profit has also increased somewhat. While clients pay more for our CAT process than some of our other offerings, they are happy to do so. We believe that cost is only ever an issue in the absence of value and CAT delivers a significant amount of value net of all the costs. To quote one of our client during a feedback session, “getting my monthly review e-mail and my annual cash flow statement gives me complete peace of mind”. As a dedicated and passionate Financial Planner, this was music to my ears. In summary, Stronger relationships with better retention and an increase in our profit. What more does a business want.”

Ian Little, Financial Planning Director, Wade Financial Services.

“My only regret about our adopting the Clever Adviser system in 2010 is that it was not available until late in my career – that said, it’s given me a new lease of life and has enabled me to continue working into my 68th year! Our only guarantee to clients when we place them onto our Monthly Review Service is that If for any reason they don’t like it, we’ll transfer them back to (lower-charged) annual reviews at our own expense. Suffice to say, that’s never yet looked remotely likely to be requested. I’ve never known an investment solution to be so popular with clients, they have really bought into their monthly involvement in the email process and review meetings are now about them and their needs, ambitions and further investments instead of being focussed on fund selection and switching. Client retention is not in question, as they recognise the process can adapt and change to meet their changing circumstances and needs, and the system has proved a boon for my busiest and most demanding clients, who can see ongoing monitoring and management of their portfolios at the monthly click of a mouse. Also noticeable is that we receive a significantly higher proportion of referrals from clients of our Monthly Review Service.”

Ralph Patterson, Director, SG Holding

“Using the clever adviser software and methodology to run the freedom financial planning investment process has been fantastic for freedom. Clients love the process because

- Clients receive consistently above average returns on their investments

- Clients receive a monthly check in on the progress of their funds
- clients have the peace of mind that their investments are not managed by one single person whether a planner or a fund manager

This is helped freedom to retain existing clients, acquire new clients who are referred by existing clients, and concentrate on proper financial planning clients (to help them find their freedom) because the money management process takes care of itself..”

Andy Nevett, Financial Planner, Freedom Financial Planning.

“I have been using Clever Adviser now for over five years. Initially we kept its performance under review ourselves before even discussing the service with clients. Based on our belief of its success we slowly started introducing clients who initially allocated a small percentage of their portfolios to gauge results. After five years of outstanding returns most of our client’s money managed via Clever. Being involved with Clever as help me transform the investment side of my business. Clients are extremely happy with the service and the returns. We have financially benefitted from the additional fees as well as a huge increase in the value of funds under management. Over the five years the value of funds under management increased by 26%, whilst our fees by a staggering 127%, and these results are without any new clients!! If you want to be part of an exciting service, provide your clients with state of the arc technology which produces awesome results, and, make your practice more profitable then speak to clever today!!!”

Gordon Mackay, Director, Mackay Macpherson