

# Mark Curtis

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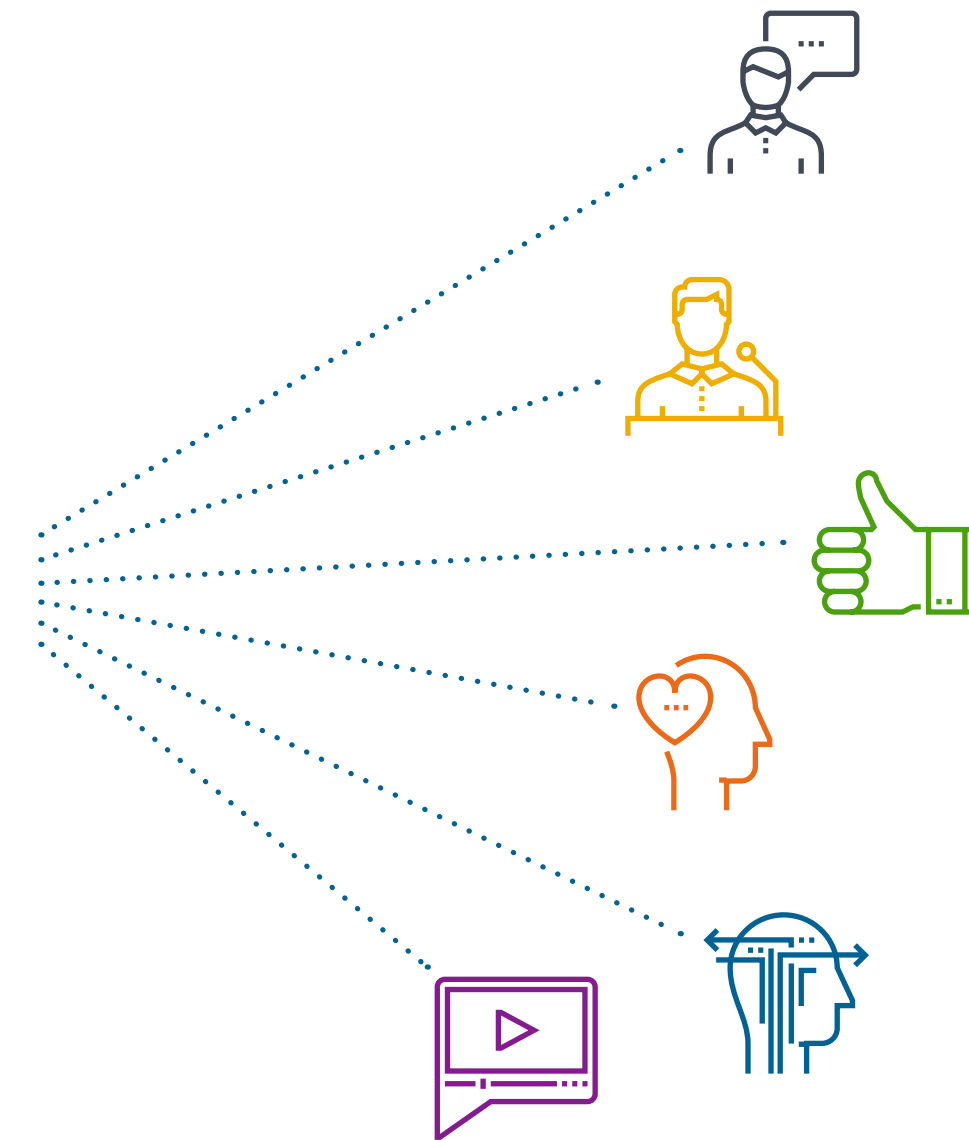


Our firm identified, back in 2016, that we use a number of platforms and providers for our clients, so we undertook a review of our current providers and those available across the marketplace.

We spoke to a select few providers, and the **key reason we chose to work with FundsNetwork, was that they were prepared to listen to how we structured our processes**, what back office we used, and the type of clients and investments we looked after. The keenness to understand how we operated at the outset was impressive – other providers tried to insist on us changing our processes to fit with their requirements.

**Over the last two years, the functionality has developed greatly, along with the support, training guides and platform functions.** And the ease at which the new business process is facilitated ensures less time is now spent in this area.

One other key aspect is that we've just acquired another IFA practice, and the online letter of authority process has ensured a smoother transition of clients to our agency, and fees being paid sooner than expected. And with a nominated support at head office, **we're able to manage our clients' assets across the range of products much more easily and also under a competitive charging structure.**



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