

SCOPE OF SERVICES

Hello!

We're sure it's been quite the journey to get to this point... It takes a courageous person to admit that they need some help and support AND to reach out and ask for it.

In this document we explain what it is that we can help you with – helping with the daily administration; lending a hand with the modelling and technical tasks; giving you some insight into what improvements can take your practice to the next level and offering an extra set of hands to keep a finger on the pulse of your practice.

Here goes!

CLIENT AFFAIRS & -ADMINISTRATION SUPPORT

WHAT THIS IS...

We see client administration and support as any activities that relate to your clients that don't require in-depth knowledge about industry legislation (other than FAIS & FICA), product specific knowledge & experience, taxation and other technical aspects that in some way relates to offering advice or guidance to clients.

IT INCLUDES –

Activities such as completing documents, forms and applications; requesting quotes and proposals; submitting applications and instructions; contract detail amendments; liaising & follow-ups with product providers and clients and so forth.

BUT EXCLUDES –

Activities such as drawing quotes or preparing proposals; compiling client reports; doing financial needs analyses; cashflow modelling; providing recommendations on products, tax- or estate structuring other matters and other similar technical activities.

PLANNING- & TECHNICAL SUPPORT

WHAT THIS IS...

Modelling, planning & technical support in our minds involve activities where we need to employ some discretion, based on our knowledge of financial products and industry legislation & our experience from past client dealings, to assist you in guiding and advising your clients on their financial affairs.

THIS INCLUDES –

Activities such as preparing models, scenarios and/or reports; preparing quotes and proposals; recommending suitable products for your clients; estate &/or tax structuring; advanced projections & calculations and assisting with completing replacement records and compiling advice records.

BUT EXCLUDES –

Administration activities mentioned above and any activities that involve improving and/or developing the 'assets' in your practice such as templates, frequently used documents, processes and operations manuals and so forth. In other words, we work with the documents, templates, and systems that you already have in place.

PRACTICE REVIEWS & -PROJECTS

WHAT THIS IS...

Anything to do with giving inputs on how we can develop or improve the existing assets in your business or expand these assets either with existing documents in our library or developing new 'commissioned' assets. Ultimately this service revolves around providing a better service to your clients or to improve the back-office functioning of your practice.

THIS INCLUDES –

Simple projects such as upgrading your frequently used documents or implementing a better filing system. We can also assist with switching to web-based e-signing or digital signing software; re-imagining your client remuneration model; defining your service offerings or helping to segment your clients.

BUT EXCLUDES –

Administration & planning support already discussed above as well as all practice- or business management activities that we explain on the next page.

SCOPE OF SERVICES

PRACTICE- & OPERATIONS SUPPORT

WHAT THIS IS...

We can be your extra pair hands to help to get things done that you are just not getting around to or that you don't want to do. Are you spending quality time with your commissions and business cashflow? Need someone to send out a broadcast Whatsapp or bulk email? Are you getting around to all the things that you're supposed to do as part of your Representative or Key Individual duties? If not, we are here to help!

THIS INCLUDES –

Any activities that form part of your existing processes or duties where we are serving as your stand-in.

BUT EXCLUDES –

All the things we've already discussed and defined 😊

That's it from our side...

Now that you have a better idea of what each type of service is about and what it includes and excludes you can tell us where you want us to lend a hand...

CHEAT SHEET TO OUR SoS

CLIENT AFFAIRS & -ADMINISTRATION SUPPORT

The back-office paperwork, tasks and activities that need to get done

PLANNING- & TECHNICAL SUPPORT

Involves some form of technical knowledge and/or discretion to be able to advise or guide clients

PRACTICE REVIEWS & -PROJECTS

Anything where we bring our experience & expertise to the table to make your business better

PRACTICE- & OPERATIONS MANAGEMENT

Items on your to-do list that require minimal inputs from us and where an extra pair of experienced hands are needed to get it done