FINANCIAL ADVISORY LAUNCH PROGRAMME · CHOOSE YOUR BACK OFFICE AND PRACTICE-MANAGEMENT SYSTEM

Back-office selection checklist

Must-have features, an integration list, and an is-my-network-already-providing-this gate.

01 Must-have features

The functions a back office has to cover for a regulated advice firm from day one.

Does it handle income reconciliation, matching provider payments to individual clients?

Does it hold your compliance records and your suitability workflow?

Does it offer, or integrate with, a secure client portal?

02 Integrations

The stack only works if the pieces talk to each other.

Does it integrate with the platforms and wraps you plan to use?

Does it integrate with your chosen cashflow-modelling tool?

03 The network gate

Before you buy anything, confirm what your network already provides.

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Does your network bundle or mandate a back-office system?

If so, are you about to pay twice for something you already have?

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