

Income Reconciliation



Outsourcing Service on Enable



<https://www.Fivewaysfp.co.uk>

Key Benefits

Simplicity - We just upload the statements and Jigsaw Tree manage the rest in a very quick turnaround.

Accuracy - We trust that the income data is being managed correctly allowing us to effectively monitor financial performance with reliable management information.

Cost - There is an obvious benefit from both resource time and cost. We have reviewed it once to see if we should take it back in house, but the results showed it was simply too much for one person and then we would have the added stress of training and managing someone to do it.



Jigsaw Tree supports us by saving me time and money and gives me confidence in our financial data”.

– **Jon Lawson**
Director

Key Services

- Outsourced income reconciliation

We were introduced to Jigsaw Tree by another firm when we became directly authorised in 2014.

Following work carried out on our business plans it highlighted a need for us to address our income reconciliation process. We considered employing someone to do it but quickly realised that by using Jigsaw Tree, we already had an expert and we didn't need to manage them.

Jigsaw Tree have been managing our income reconciliation ever since and we are delighted with the service as it gives us total confidence.

About Fiveways

FiveWays Financial Planning, are an independent, owner-managed advisory firm, dedicated to helping clients achieve their life goals, believing that these objectives should be central to one's financial future, regardless of wealth. Their primary aim is to explore these goals and identify potential barriers.

By thoroughly understanding each client's unique circumstances, they offer tailored strategies, financial plans, and investments.



Please contact us so we can discuss your requirements:

@ hello@jigsawtree.com

0800 246 5416

@jigsawtree.com

www.jigsawtree.com

