



case study

How Chase Financial Management Scaled Efficiently by Outsourcing to Jigsaw Tree

Chase Financial Management



Chase Financial Management is a trusted, local firm of Chartered Independent Financial Advisers, fully qualified and authorised to deliver comprehensive financial planning services. Based in the heart of Gloucester, the firm supports both individual and corporate clients across the Southwest and Midlands.

In 2019, Andy Wilkinson took ownership of the business, continuing its strong legacy while bringing a fresh perspective to its growth and operations. By 2023, Andy engaged Jigsaw Tree to explore ways to enhance operational efficiency and reduce business risk. Rather than continually retraining internal staff, Andy recognised that outsourcing certain functions could offer a more scalable and sustainable solution for the firm's future.

The Solution: Partnering with Jigsaw Tree for End-to-End Outsourcing

Chase Financial Management had recently adopted intelliflo office (io) and recognised the need to optimise their use of the platform. They initially approached Jigsaw Tree for support, where a Data Business Assessment (DBA) was conducted, followed by the successful delivery of our Acer package by Naya.

It was through this engagement that Chase was introduced to Jigsaw Tree's income reconciliation and administration services. As the firm grew, it became clear that managing income reconciliation in-house was becoming unsustainable. Relying on a single individual created a key person risk, pulling critical staff away from more strategic, client-focused tasks and exposing the business to inefficiencies.

Recognising the need to streamline operations, reduce risk, and free up internal resources, Chase made the decision to outsource key functions to Jigsaw Tree.

After a comprehensive review, Jigsaw Tree's specialist team took over the following functions:

- All client administration activity
- Creating and processing cash receipts
- Reconciling income statements
- Producing detailed monthly management reports
- Amongst other things

Key Services

- Outsourced Income Reconciliation
- Outsourced Administration

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The Results: Reduced Risk, Greater Focus, and Better Business Intelligence

By outsourcing to Jigsaw Tree, Chase Financial Management gained:

- **Elimination of key person risk** – making the process scalable and future-proof
- **Improved operational efficiency** – enabling internal teams, to focus on their core objective: delivering great outcomes for clients
- **Accurate, consistent MI reporting** – by leveraging io's income functionality to its full potential, Jigsaw Tree ensured that Chase received timely and comprehensive management information

After a seamless transition to Jigsaw Tree's business-as-usual (BAU) team, the benefits were almost immediate. Chase could confidently grow their business knowing that critical back-office functions were in expert hands, allowing them to remain client-focused while operating with greater resilience and agility.

"Outsourcing to Jigsaw Tree was a game-changer. It's allowed us to scale without stress and gives us the confidence that everything behind the scenes is being handled professionally and efficiently."

Andy Wilkinson - Chartered Financial Planner

**Elimination of Key
Person Risk**

**Improved
Operational
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**Accurate,
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