



jigsawtree

business improvement is a journey not a race



Outsource to Jigsaw Tree



What do you do when the one person involved in Income Reconciliation leaves?

Kymin
Financial Planners

www.kymin.co.uk

Key Benefits

Expertise and knowledge –
By having in depth knowledge of CRM systems the Jigsaw Tree outsourcing team can provide a seamless service and ensure no disruption to clients' day to day working practices

Use of the Jigsaw Tree Statement Portal – Using the Jigsaw Tree Statement Portal to upload CSV and paper statements gives clients improved accuracy as there is no rekeying of data. 100% of statements are uploaded so that they can be processed electronically.

Timely month end close –
Jigsaw Tree close down client's month ends within five days of the end of the month to ensure payments to advisers are made accurately and on time



Having worked with Jigsaw Tree on a number of previous projects we contacted them for help to outsource our income reconciliation when a team member went on maternity leave. By working with Jigsaw Tree, we had confidence that there would be a seamless transition, with our advisers being paid on time and our monthly MI reports produced accurately and within five days of the end of the month.

– **Robin Hall, Managing Director**
Kymin

Key Services

- Reconciliation of monthly income against expected
- 100% electronic matching of all types of statements through the Statement Portal
- Liaison with client on any outstanding amounts and issues
- Production of month end reports based on client requirements
- Close month end within a five day turnaround of month end

Kymin Financial Services have been giving financial advice to clients in South East Wales since 1993. They offer a wide range of specialist services, whilst providing a high-quality service and building long term relationships with their clients.

Jigsaw Tree and Kymin have worked together on several projects over the past ten years and have built up an excellent working relationship. In 2018 a team member at Kymin, who had sole responsibility for Income Reconciliation, was due to go on maternity leave. Due to high workload and lack of knowledge in Income Reconciliation there was no one else within Kymin who could pick up this work.

As a company providing Outsourced Income Reconciliation support, Jigsaw Tree were contacted by their MD Robin Hall to discuss their outsourcing services.

Jigsaw Tree were able to provide full outsourcing of Kymin's Income Reconciliation which includes:

- **Creation of receipt postings from Bank Statements**
- **Automatic processing of EDI, CSV and Paper Statements through the Jigsaw Tree Statement Portal**
- **Regular communication regarding un-reconciled income**
- **Weekly update on unsettled receipts and reasons**
- **Month end close with a standard turnaround time of five working days post end of month.**
- **A suite of reports securely issued at the end of each month end.**

When the team member returned from maternity leave a decision was made to continue with the outsourcing service offered by Jigsaw Tree allowing the team member to focus on client facing work.



Please contact us so we can discuss your requirements:

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