



jigsawtree

business improvement is a journey not a race



Technology  
Adoption and  
Outsourcing



## Embrace technology and find more time for clients



<https://www.catonfry.com/>

### Key Benefits

Allow more time for Peter to focus on his client work

Configured Intelliflo Office so that better adoption could be achieved

Set up the client portal to deliver accurate information direct to the end client.



Jigsaw Tree were able to identify the key areas that needed to be changed and took control of the technology so that I could focus on giving more time to my clients. They now provide outsourced administration and paraplanning and I would have no hesitation in recommending Jigsaw Tree as they have made a real difference in all areas of my financial services company”.

– **Peter Caton – Director**  
Caton Fry Financial Services Limited

## Key Services

- Configuration of Intelligent Office and the Client Portal
- Outsourced Administration and Paraplanning
- Training

### Caton Fry Financial Services Limited changed their CRM solution from Quay Software to Intelliflo Office in 2018.

This proved challenging and the business didn't achieve what it had hoped for as they struggled to implement this new technology. When the country went into lockdown and a member of staff was hospitalized after they contracted Covid the business had to look for alternative solutions.

Peter Caton was referred to Chris Baigent-Reed who helped to identify the areas in the technology configuration that could do with changing and this included putting workflows into place, providing training for the staff, income reconciliation and making sure valuations were correct.

This work enabled Peter to spend more time servicing his clients and to help with increased regulatory requirements for RMAR and MiFID II reporting.

Jigsaw Tree also deliver Outsourced Administration and Paraplanning and they have helped to manage the firms CRM system ensuring that their clients plans are serviced/updated, this was crucial in the setting up of the Intelliflo Office portal so clients could see live valuations and share information securely.



Please contact us so we can discuss your requirements:

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