



Income Reconciliation – why outsource?

Jigsaw Tree has been providing support to the Financial Advice sector for over a decade and have extensive experience of working with firms to provide a variety of services.

This question of, 'Why outsource?' is one that gets raised frequently when we talk to firms about available income reconciliation solutions. The reasons for 50+ firms selecting Jigsaw Tree to undertake this important function can be broken down as:

- 🧩 Freeing up more time for those in the business to focus on client facing activities.
- 🧩 Removing single points of failure in these processes.
- 🧩 Eliminating the challenging and time-consuming work of recruiting and training for these roles.
- 🧩 Providing continuity of service and greater risk management.
- 🧩 Securing peace of mind, as we deliver according to the SLA's put in place.
- 🧩 Establishing a fixed cost service, only paying for what is provided and maximising cost-effectiveness.
- 🧩 Easing the worry of covering sickness and/or holiday, giving more flexibility and consistency when a key member of staff is not available.
- 🧩 Boosting overall expertise far wider than income reconciliation; therefore making a critical friend in understanding how the company's technology is being used and how it could be improved, allowing the advice firm to provide a more streamlined and effective service to their clients.
- 🧩 Bringing over 10 years of experience of working with clients of varying size and requirements. We have encountered most scenarios and have worked closely with each firm to find the best solution for them.
- 🧩 Standardising reporting packs to cover all the requirements firms will need to ensure full understanding of income received, reconciled, or owed to the business.

Over the last 12 months, we have found that more and more advice firms are looking at what flexible outsourcing options are available. They have discovered that our knowledge and understanding of both the technology and how it is best implemented gives us a clear advantage in knowing how we can support their business better and deliver the right outcomes.

We have experts who have worked within technology companies as income specialists, or as finance managers within advice firms. We understand both cash received and accruals accounting in detail, allowing us to ensure your income is reconciled according to your business needs. We have built a secure portal allowing you to upload both your income and bank statements with confidence. To us, data security is a key and essential priority.

If outsourcing appeals to you and you would like more information, please visit our website www.jigsawtree.com where we have testimonials and case studies, call us on 0800 246 5416, or email hello@jigsawtree.com and we will be only too pleased to speak with you. If you would like to speak with one of our existing clients, we are keen to put you in touch, as this is a great way of understanding better the services that we provide.



To accelerate your firm towards a digital transformation, get in touch with Jigsaw Tree.

@ hello@jigsawtree.com
@ jigsawtree.com
📞 0800 246 5416
🌐 www.jigsawtree.com