

STREAMLINE THE PROCESS OF CREATING SUITABILITY REPORTS

Facilitating seamless workflows,
boosting efficiency, and fostering
consistency – all within reach
with ateb suitability.



Background

ValidPath is an award-winning network that supports Independent Financial Advisers (IFAs) across the UK.

The network is proudly independent and committed to independent financial advice. It has a strong culture and a focus on supporting its Members to deliver better client outcomes to a wider demographic of people with less risk.

ValidPath's commitment to delivering a 'best-in-class' proposition has seen the network grow over the last 20 years to include hundreds of Independent Financial Advisers, Mortgage Brokers and support personnel and their thousands of clients across the UK.

The network offers a range of services to support IFAs in building their businesses. This includes everything from their FCA authorisation to compliance support, file checking, agency management revenue and commission reconciliation, practice management, training and development, market-leading technology and succession planning.

ValidPath has been recognised as an FTAdviser Top 100 Financial Adviser in the UK.



Solution

Heledd Richards, the Network Operations Director at ValidPath explains:

“ We chose ATEB Suitability because it offers a comprehensive and user-friendly solution designed specifically for financial advisers.

The software includes a range of features that streamline the process of creating suitability reports, saving time and reducing the administrative burden.

Heledd states:

“ATEB Suitability offers templates and tools that allow for customised reports tailored to the client's specific needs and ensure that client recommendations meet changing regulatory requirements and that the reports are always compliant with the latest regulations.”

She continues:

“ValidPath has chosen to make ATEB Suitability available to all our member firms to support them in generating their suitability reports. The software integrates seamlessly with our back office solution, creating a smooth workflow with numerous benefits, including efficiency, reducing the need for duplicate data entry and consistency.”

When asked what 3 words she would use to describe ATEB Suitability reports, Heledd simply said:

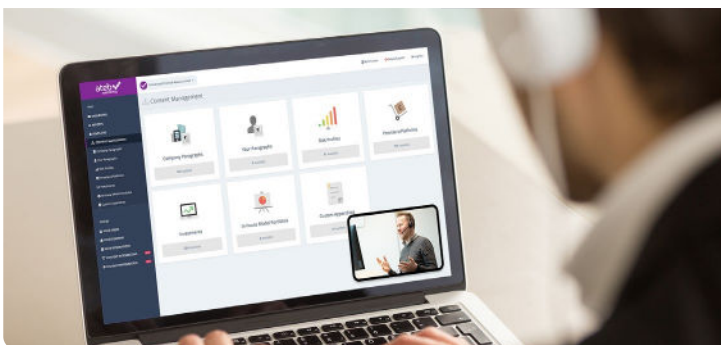
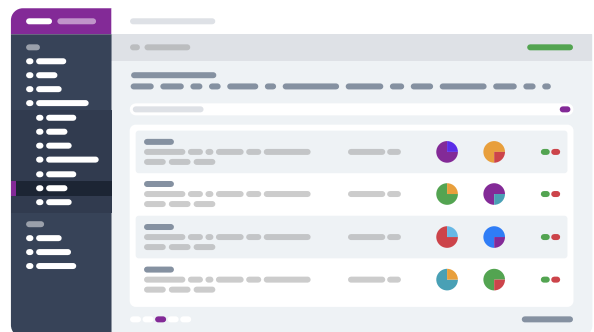
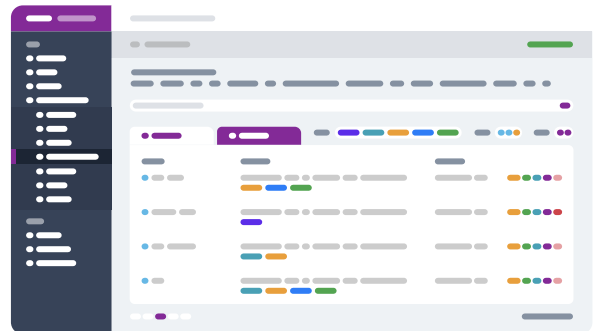
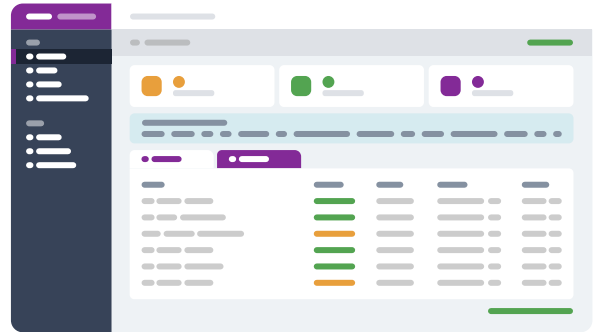
“The three Cs - Comprehensive, Customisable and Compliant”

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