

CASE STUDY

Revolutionising client engagement and satisfaction with FE Analytics

How a boutique financial adviser achieved personalised client solutions and enhanced their client satisfaction with FE Analytics

Background

TDS Financial Ltd, a boutique tailored financial advice firm, was established by a seasoned professional with over three decades of experience in banking and financial services, having also worked with high-net-worth clients and family offices across the Middle East and Far East regions.

The firm recognised that leveraging the right technology is essential not only for optimising processes but also for delivering significant value to financial advice clients. It needed a robust, flexible tool to manage client portfolios and provide personalised financial advice.

Objectives

The aim was to find a solution that could cater to clients with varying levels of investment experience, from basic investors to seasoned professionals, and their unique needs.



Adaptability



Seamless onboarding



Tailored analysis



Versatility



Independent tool



Evolving tool



Client engagement



Client support

Achievements

FE Analytics has been instrumental in delivering tailored financial advice to clients and significantly enhancing TDS Financials' operations. The tool's flexibility and high-quality outputs have been crucial in providing personalised analysis, leading to better-informed investment decisions for clients.



Seamless integration: Smooth onboarding with excellent support from FE Analytics, allowed TDS Financial to quickly start using the tool without disruptions.



Versatile tool: FE Analytics caters to all investment levels, enabling TDS Financial to meet diverse client needs effectively.



Reliable tool: FE Analytics offers comprehensive data and analysis tools, ensuring high data integrity and accuracy. Its risk profiling and investment planning tools enhance reliability, facilitating delivery of robust, personalised advice, whilst saving an adviser 13 hours per week.



Tailored analysis: Customisable outputs of FE Analytics allow TDS Financial to provide tailored analysis for each client's unique needs, aiding in transfers and delivering optimal advice.



Enhanced client engagement: The tool not only reduces client on-boarding time by 55% but also improves client conversations with clear, detailed analysis, leading to higher satisfaction and stronger relationships.



Effective transfer assessments: FE Analytics plays a crucial role in assessing transfers, helping TDS Financial deliver the best advice for well-informed investment decisions.



Evolving tool: Future integration with CashCalc and Salesforce promises continuous improvements, ensuring advisers have access to up-to-date resources and capabilities for high-quality advice.



£102,000

**approximate
amount saved in
adviser costs
annually**

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I am a strong advocate of FE Analytics and would confidently endorse it to other professionals in search of a robust and well-supported analytical platform. Its exceptional flexibility and the consistently high quality of its outputs have rendered it an integral component of our Wealth Management Practice, delivering measurable value in our client engagements.

Tony Sareen

Co-Founder and Managing Director
TDS Financial Ltd

As your dedicated fund manufacturing and distribution partner, we navigate complexity to unlock your potential. We transform everyday challenges into opportunities for expansion with data-led solutions and established industry expertise.



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