

An introduction to our solutions





Technology

Once considered a ‘nice-to-have’, integrated technology is now critical to the success of your business. Our technology solutions combine practice management, business management, client management, consultancy and a range of other services into a secure, intuitive web-based suite.

Our mission is to deliver measurable value by combining the technology elements normally spread across multiple providers into one, simplifying your operations and freeing up time for your advisers and support staff.



Digital advice and self-service

Time is the new currency. Clients are demanding more online. These two factors are the driving principles behind Wealth Platform, our digital advice solution. Configurable to your firm's service model and client preferences, Wealth Platform provides a consolidated view of your clients' wealth, regardless of wrapper type and provider - whether advised or self-managed. Client reviews can be conducted remotely. Clients can manage their own data, securely, with you in control.

With links to over 100 providers and platforms, secure communication between clients and their adviser / service teams, Wealth Platform puts the power of digital in your hands and brings the potential to service a greater range of clients than face-to-face advice alone.

Regulation

The burden of regulation is increasing rapidly, as are the penalties for getting it wrong. Managing risk in your business has never been more complex or time-consuming. We provide a range of regulatory support and outsource services to ensure your time and energy is spent on delivering great results for your clients and growing your business.

From full regulatory outsourcing for Chartered Financial Planning firms via Best Practice, to targeted compliance support services for larger directly regulated firms, We deliver award-winning solutions to high quality financial planning and wealth management firms.



Discretionary Investment

Creating and maintaining your firm's investment proposition can be a real competitive differentiator. However it can also be time-consuming and risky, requiring substantial effort and qualified staff. Our in-house Discretionary Investment solutions provide a wide range of portfolios which can be tailored for almost any desired client investment objectives.

As your partner, we can help you create a market-leading Centralised Investment Proposition through our own discretionary permissions. And with a track record of over ten years, our solutions have been proven to deliver strong investment returns while being simple and cost-effective.

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Discretionary platform

Providing access to a wide range of Discretionary Fund Managers and investment instruments to build your own solutions, the Fusion Wealth platform is a technology-driven investment platform with its own Discretionary permissions, capable of delivering all the elements of your firm's Centralised Investment Proposition in one place.

With sophisticated business processing, trading and tax management, a range of cost-effective tax wrappers and institutional fund pricing via the SEI global custody engine, Fusion provides a full-service Platform environment which forms a tightly integrated element of Benchmark's wider technology ecosystem.

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Succession planning

Your clients are your livelihood, and your business is your retirement plan. Finding a trusted partner to facilitate the hand-over of your business can be a hugely time-consuming minefield and is possibly one of the most important acts you will ever undertake as a business owner.

Benchmark Capital has many years of experience developing structured, non-disruptive succession plans for financial planning and wealth management firms. From finance and buyout options, to guidance and support for internal succession planning and management hand-over, we have a unique, long-term approach driven by positive client outcomes and trusted relationships.

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