"Adviser Office helps firm to quantify clients expectations and improve client service"

Warwick Butchart Associates provide specialist investment and financial planning advice to a range of private individuals, companies, charities and pensions funds across the UK. The firm currently has six Registered Individuals and five support staff.

Joint managing directors, David Burren and Len Warwick, have over 60 years combined financial services experience and have held senior positions with UK and offshore financial services and investment companies prior to their time with Warwick Butchart.

Many of the firm's clients are fee-based but each client is treated individually, with some preferring commission-based advice or fixed price arrangements. With a strong commitment to providing high value and specialist advice, Warwick Butchart is very much an 'investment-led' practice.

> "Adviser Office helps us to provide high quality service to our clients as well as enabling us to grow in the way we want to."

Why Choose Adviser Office?

In May 2003, prior to choosing Adviser Office Professional from 1st, Warwick Butchart reviewed its needs and held demonstrations of various industry software systems before deciding that Adviser Office 'bridged the gap' between front and back office in a way that other systems did not.

The firm was impressed with the depth and functionality of the investment aspects of the Adviser Office system. David Burren, explains: "The holistic approach of Adviser Office sealed the decision for us. This was particularly evident when we saw the risk profiling tools - which fitted in ideally with our investment process. 1st are clearly investing heavily in developing their software and support services, and we are proud to be using a system that is first rate - as this reflects our whole business strategy at Warwick Butchart. Adviser Office helps us to provide high quality service to our clients as well as enabling us to grow in the way we want to."

Investment Risk Assessment

Warwick Butchart uses the risk profiling tools contained within Adviser Office in client meetings, discussing the clients' responses and options as part of an interactive two-way process. The Investment Risk Assessment is used to help assess a client's attitude and tolerance to risk while measuring it against expectations of investment return - using stochastic (probability) modelling.

David Burren, who likes to conduct detailed quantitative and qualitative research, particularly likes the behavioural analysis aspect of the questions contained in the risk profiling tools. He says "It helps both the client and ourselves identify what each of us really means by risk and reward. We can then focus on agreeing suitable asset allocation models. This leading edge technology is now a vital part of our Investment Process, and is a quantum leap from the old 1-10 'system' still used by many advisers."

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Warwick Butchart Associates Ltd
Telephone 01242 584144, Web www.warwickbutchart.co.uk