



Customer story

## BpH Wealth Management

### Company profile

BpH Wealth Management LLP was established in Harpenden in 1984 by Partner, Michael Freedman, who was later joined by Partner Simon Brown in 1988. They specialise in providing Lifestyle Wealth Management, a way of helping clients create a balance between life, money and giving back to society. The business is Chartered and has since grown to 21 employees providing advice across the product spectrum, up and into retirement.

### Why they use Fastrak

BpH were originally using Iress's Adviser Office integration with Word to produce their reports. Whilst it was easy to amend the data and highly configurable, the system and reports weren't very aesthetic and it had limited valuation integrations. However, the biggest problem was the fact that it only produced simple growth returns rather than their desired money weighted returns they wished to provide to their clients. They subsequently moved their back-office function to another provider, but encountered the same problems with the reporting function.

Prior to the transition period they began engaging with Fastrak. Whilst their new back-office offered many advantages, they felt that Fastrak was still the reporting tool of choice, due to its unique ability to offer money weight returns, numerous platform transaction level data integrations and high quality, configurable reports. Darren Weeks, Compliance and Operations Manager, said "It is important to have accurate transaction level data

### Key facts



**Location/s:**

Harpenden



**No. of advisers:**

4



**No of support staff:**

17



**Key areas of advice:**

Pensions, Investments, Protection, Tax, Estate Planning, School Fees Planning

for reporting purposes. It is essential as we can't produce the valuation reports we want to send to clients on a money weight basis but also from a Mifid II perspective."

Since using Fastrak in their business, BpH have been able to save considerable time in producing client reports compared to the Adviser Office Word based service. Darren said "The initial report does take a little bit longer, because we triple checked all of the data, but now the first year of reports have come round we are making fairly significant time savings".

Client feedback to the new report formats has also been positive, in part due to the better flow and aesthetics of the reports Darren said "I would recommend Fastrak to others... We are now saving between 20-50% of time producing valuation reports".

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**Darren Weeks**

Compliance and Operations  
Manager

## Key benefits of Fastrak



**Ease of use**



**Improved user  
experience**



**Beautiful bespoke  
reports**



**The secure client  
portal**

**Want to know more? Let's start a conversation**

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