



THE COMPANY

The Wealth Management Group LLP (WMG) is a firm of Financial Advisers based in Yorkshire offering a bespoke service for discerning clients, both individual and corporate.

WMG offer a comprehensive financial planning service for all investment and protection needs. Their main services include, pension planning, financial planning for retirement, income protection, investments and saving plans as well as life assurance plans and tax planning.

They also offer expert advice on the new qualifying work-place pensions, helping firms to deliver viable auto-enrolment solutions to corporate clients.

THE ISSUES

As a professional services firm, it was vital for WMG that they used a secure email system to communicate their sensitive information both internally and externally. One of the specific features they required as an FCA regulated firm, was a reliable and user-friendly audit trail.

They also had to consider that their clients have varying degrees of computer skills; any system adopted needed to be easy for clients to use without the need to install additional and complicated software. WMG also wanted to reduce the risks associated with human error and wanted to control their security policy centrally.

It was important for WMG to find a robust, functional, easy-to-use and cost effective, secure email solution.

“In adopting the SSLPost solution, we experienced a dramatic reduction in consumable costs. More importantly, our FCA obligations, data security and green policies are fully supported.”

Russell Bavinton, Managing Partner, WMG

THE SOLUTION

After researching the market, WMG selected SSLPost. Winning factors included central management of encryption and in-built audit reporting; it ticked every box.

The solution was technologically advanced, offered simplicity, smooth integration, was cost effective also supported their green policies.

WMG liked the speed and ease with which they were up and running. Emails sent to predefined recipients, domains and groups were encrypted automatically using SSLPost BSP. The in-built audit trail allowed WMG to monitor the progress of the communication throughout its journey to the recipient including date and timestamping when it was opened.

THE OUTCOME

All sensitive communications delivered to both clients and third parties, are now sent using the SSLPost encrypted email solution. FCA requirements are met and WMG are now able to demonstrate to clients that they take their responsibility to protect their sensitive information, seriously.

Risk was reduced immediately through central control of encryption and user security policy. Training was minimal and implementation fast.

WMG have virtually eliminated the need to produce hardcopy documents; benefiting from significant savings through reduction of office consumables and resource.