finura group

Strategic Technology Support

A FLEXIBLE CTO SOLUTION FOR OUR PARTNERS

Our people & capabilities

Team of 8 Advice/Technology Specialists.

Combined 150 years of wealth & technology experience.

Experience across all major Advice, CRM and platform technologies.

Projects with over 100 IFAs, Licensees, Platforms and Technology providers.

Global partner ecosystem of specialists.

Independent and owned by the staff.

Hands-on experience with all major advice tech solutions.

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Scope of services

Strategic

Develop and maintain customer technology roadmap.

Steering comittee support for major projects.

Provide ongoing market and competitor insights.

Attendance at Board and ExCo meetings

Operational

Procurement of key service providers.

Support change management initiatives within the business.

Ongoing support to internal IT teams on project delivery and solution design.

Financial

Support vendor management and negotations.

Provide CFO with guidance on technology spend performance and improvements.

Finura Group Technology Roadmap

IFA CTO Timeline

1
Situation Assessment / Goal Setting

2
Stakeholder engagement

3
Technology Audit

4
People & Capabilites

5
Set 3,6,12 month priorities

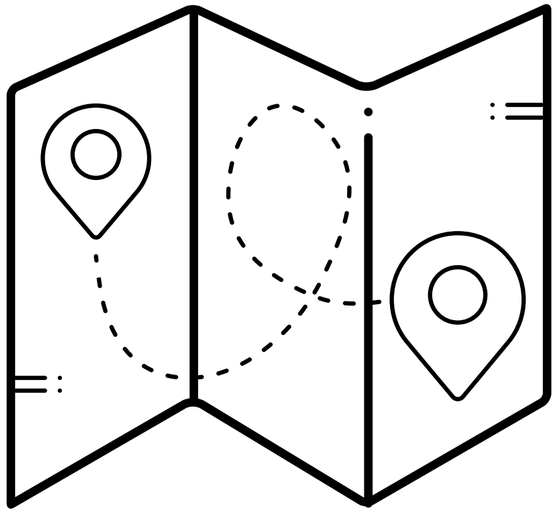
6
Execution and Delivery

7
Ongoing Support & Review

Client Story

5 Advisers, 5 Support Staff
1 MD & 1 COO.
Self licensed.
Outsourced paraplanning
Margins 30% but working very hard.
Admin errors cost business
60k previous year.

- Working groups established to improve advice process & technology.
- MD was taken out of day-to-day decision making on tech.
- Finura attends board meetings and management meetings.



Were transitioning CRMs -spiralled out of control (cost and time).
Technology not supporting advice process.
Client reviews were manually put together.
No cybersecurity infrastructure
No client portal.

- Costs recovered from CRM provider for failed delivery.
- Rebuilt existing CRM which was fit for purpose (missing integrations).
- Cybersecurity in place.
- Implemented Client Portal (with partner).
- Automated client review process.
- Saved $20K pa on unused software licenses.

Pricing

Pricing starts from $5,000 per month (ex GST).

Pricing will vary depending on:

- Business complexity
- Internal resourcing
- Likely volume of projects scheduled

Not included:

- Software costs
- Cybersecurity
- Enterprise IT services
- M&A Due Diligence

Adjunct Services:

- XPLAN Custom development.
- Social Media Content & management
- Microsoft 365 Power Platform Implementations.