

CASE STUDY



Improved reporting and scalable planning through integrated FE Fundinfo tools

How Robin Collins enhanced review efficiency and supported client bank growth using Nexus for IFAs

Background

As client numbers increased and regulatory expectations became more demanding, Robin Collins needed a more efficient and consistent approach to reporting and planning. The goal was to gain better access to reliable investment data and support growth through the smooth acquisition and onboarding of new client banks.

Objectives

To improve reporting consistency and enable scalable client planning, Robin integrated FE Analytics and FE CashCalc (Nexus for IFA's) across key areas of the advice process, including:



Client reporting



Performance analysis



Cashflow modelling



Data integration



Planning efficiency



Client engagement



Scalable growth

Achievements

Robin now delivers more consistent, data-driven client reviews and is better equipped to assess new client bank opportunities quickly and accurately.



Streamlined reporting FE Analytics enabled quicker access to risk scores, performance tables, and one-year comparisons, simplifying report creation and ensuring consistency.



Integrated planning by linking FE Analytics portfolios to FE CashCalc, Robin created more realistic cashflow projections and eliminated duplication of data entry.



Support for acquisitions structured access to underlying investment data made it easier to evaluate client bank opportunities efficiently.



Improved accessibility Replacing third-party tools with FE fundinfo's platform resolved access issues and improved the availability of investment data.



Enhanced growth capability The tools supported client base expansion by making processes more scalable and investment data more reliable.



400

**hours saved annually
on admin**

Operational efficiency
increased by around 55%

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We're very happy with the outputs from FE fundinfo. The tools help us work more efficiently and make faster decisions, especially when looking to grow through acquisitions.

Robin Collins

Head of Data & Distribution

As your dedicated fund manufacturing and distribution partner, we navigate complexity to unlock your potential. We transform everyday challenges into opportunities for expansion with data-led solutions and established industry expertise.



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