







3 to 4

weeks

Fact finds

Fact finds

KYC

Risk questionnaires

Fact finds

KYC

Risk questionnaires

Pension transfers

Fact finds

KYC

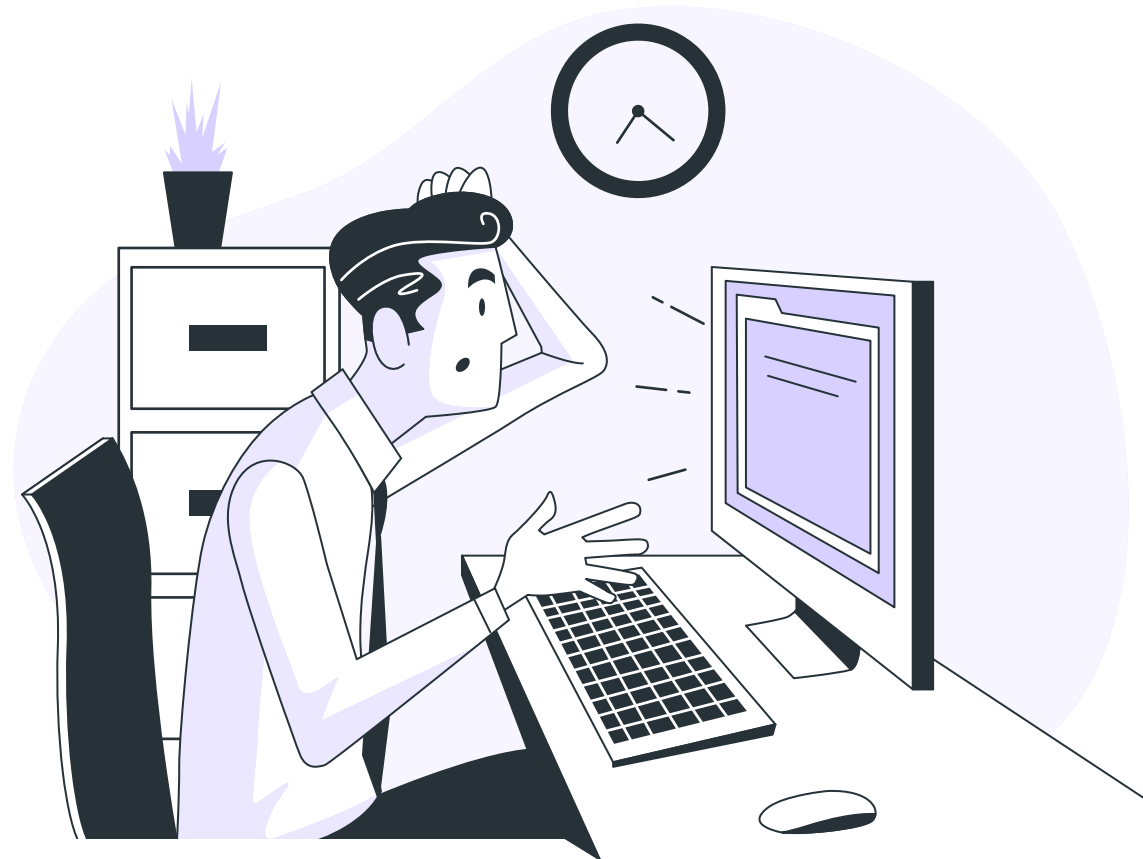
Re-keying

Risk questionnaires

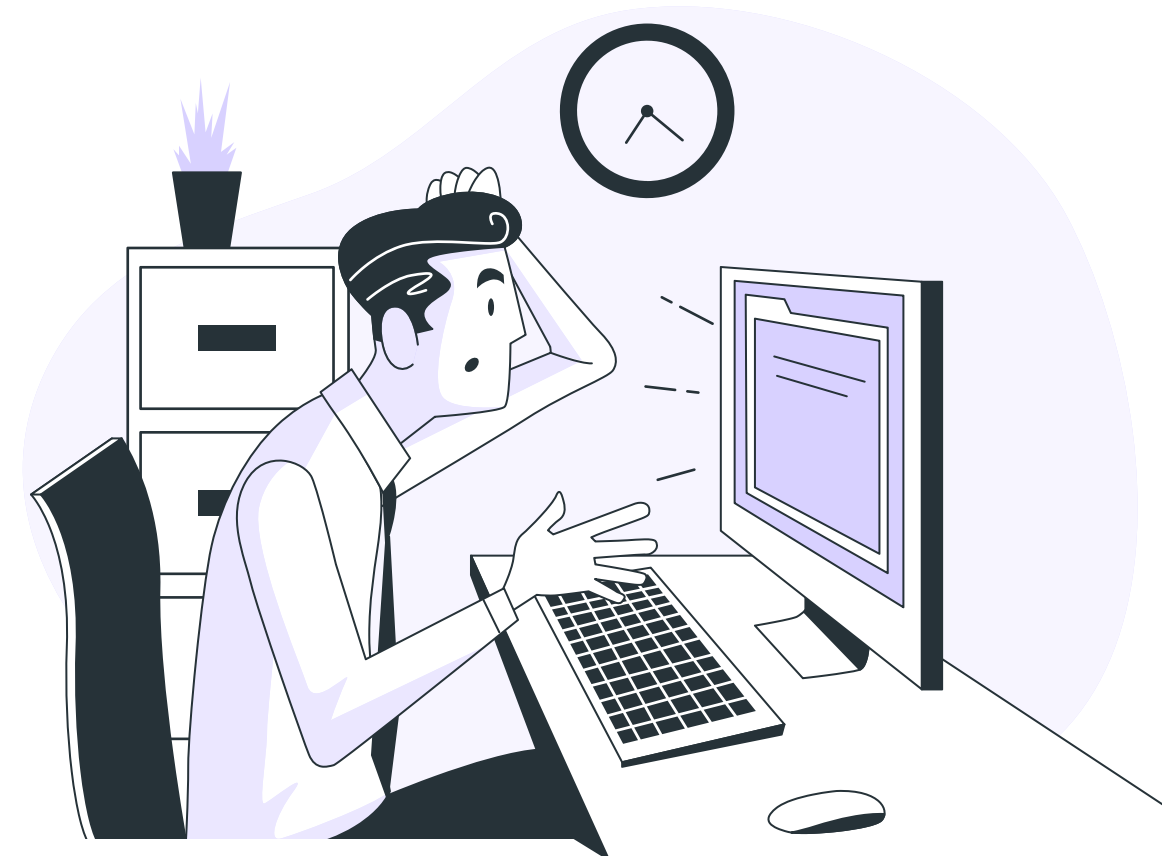
Pension transfers

KYC

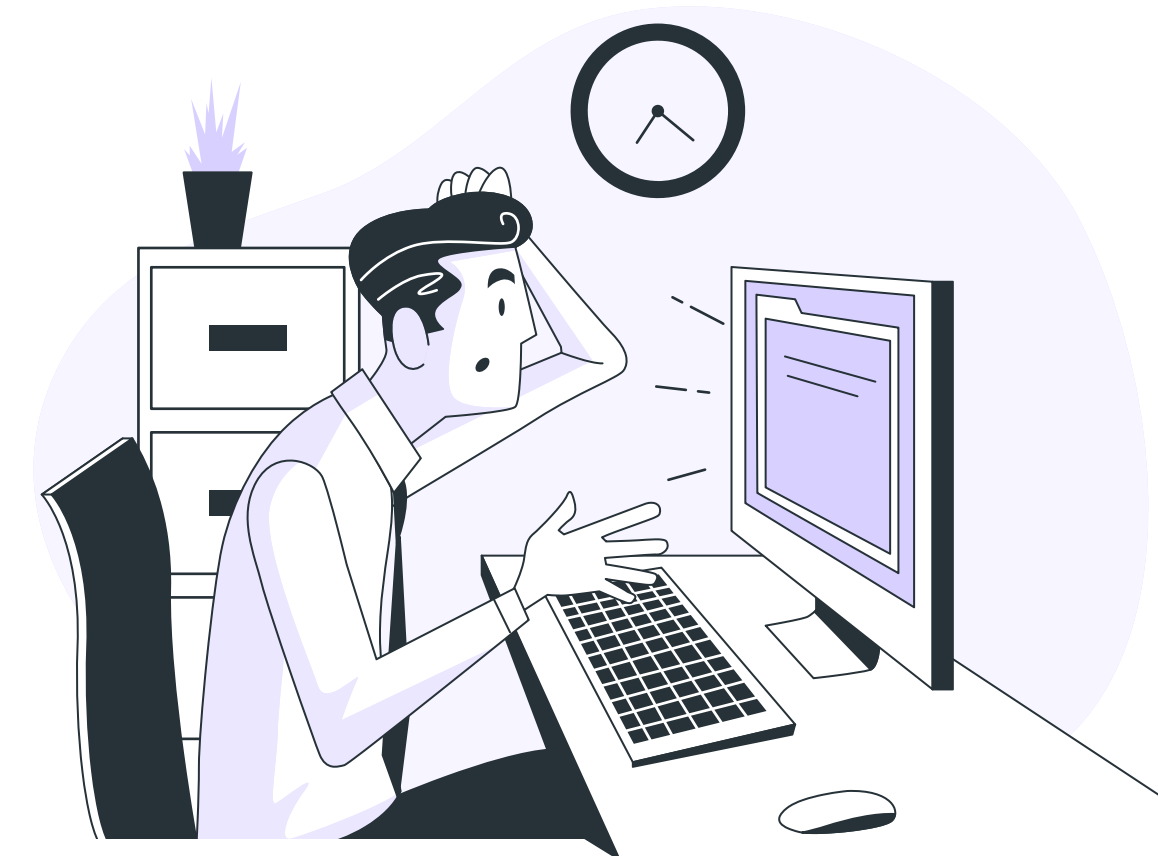
Fact finds



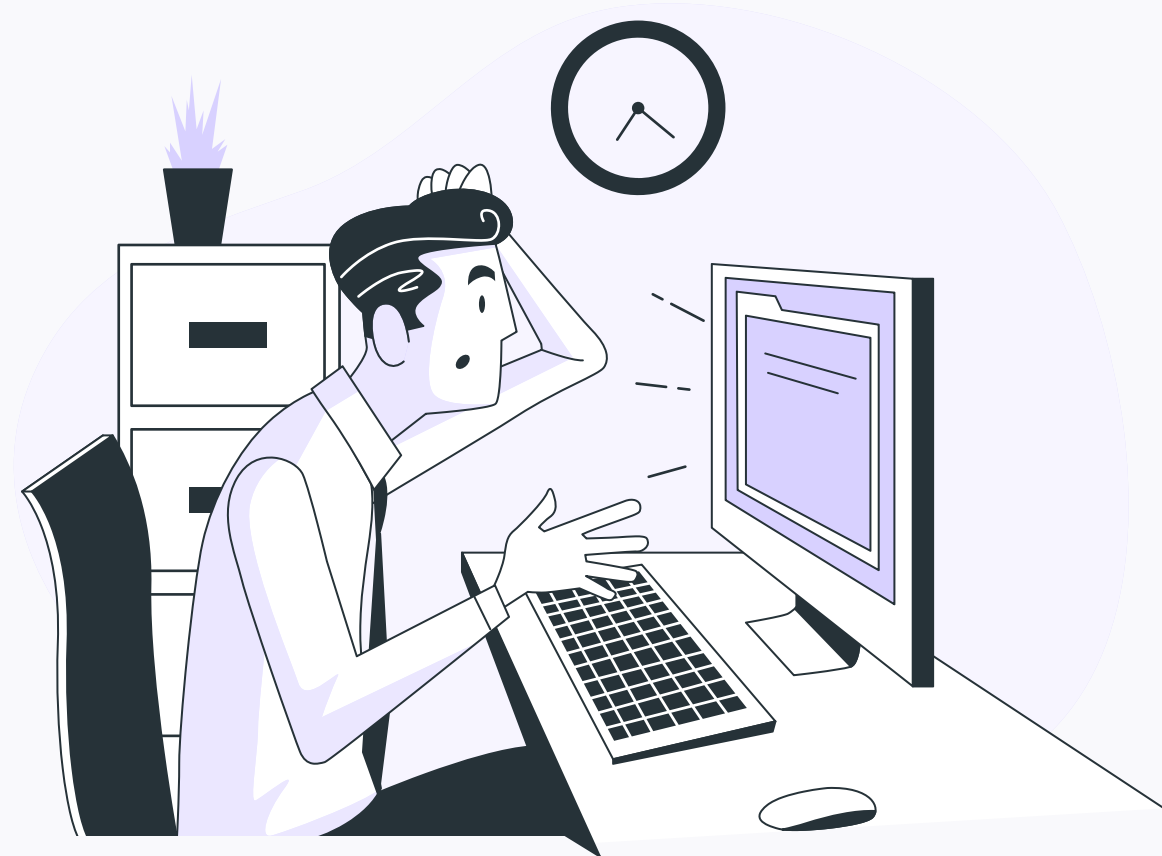
Back office system



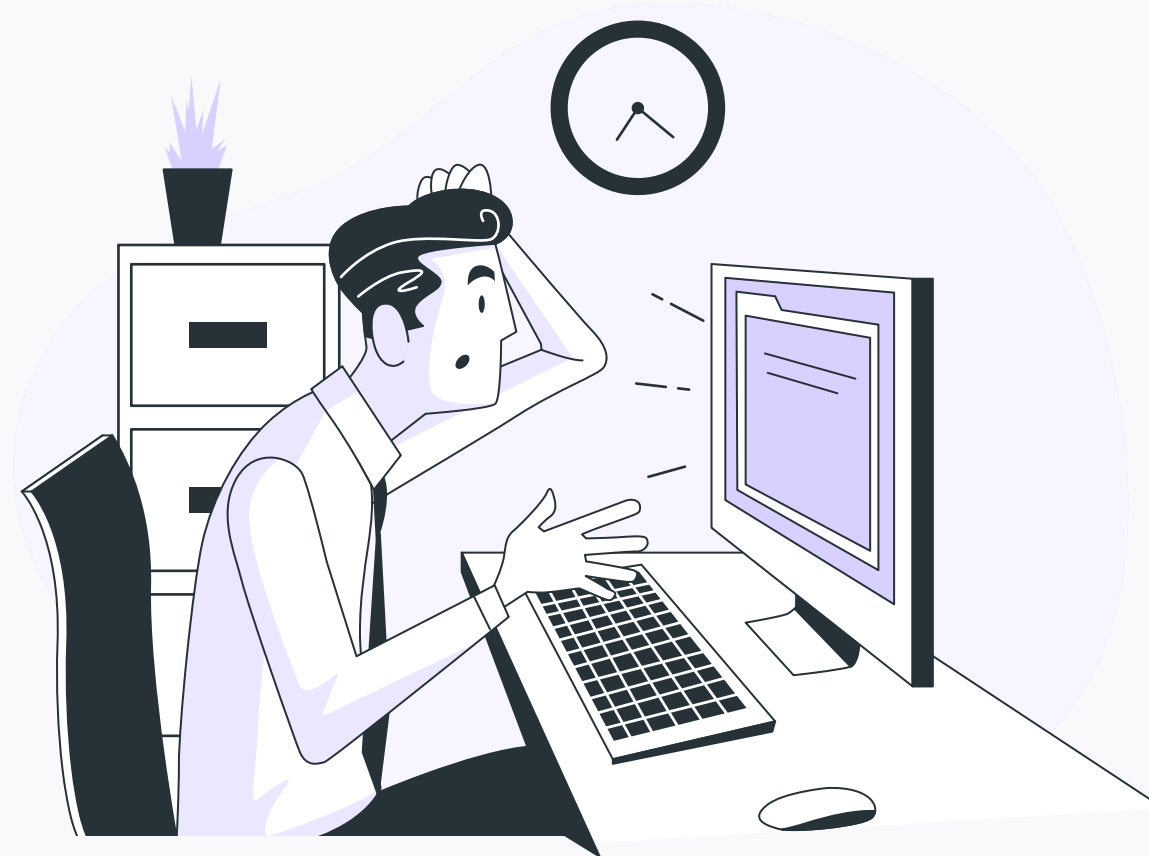
Back office system



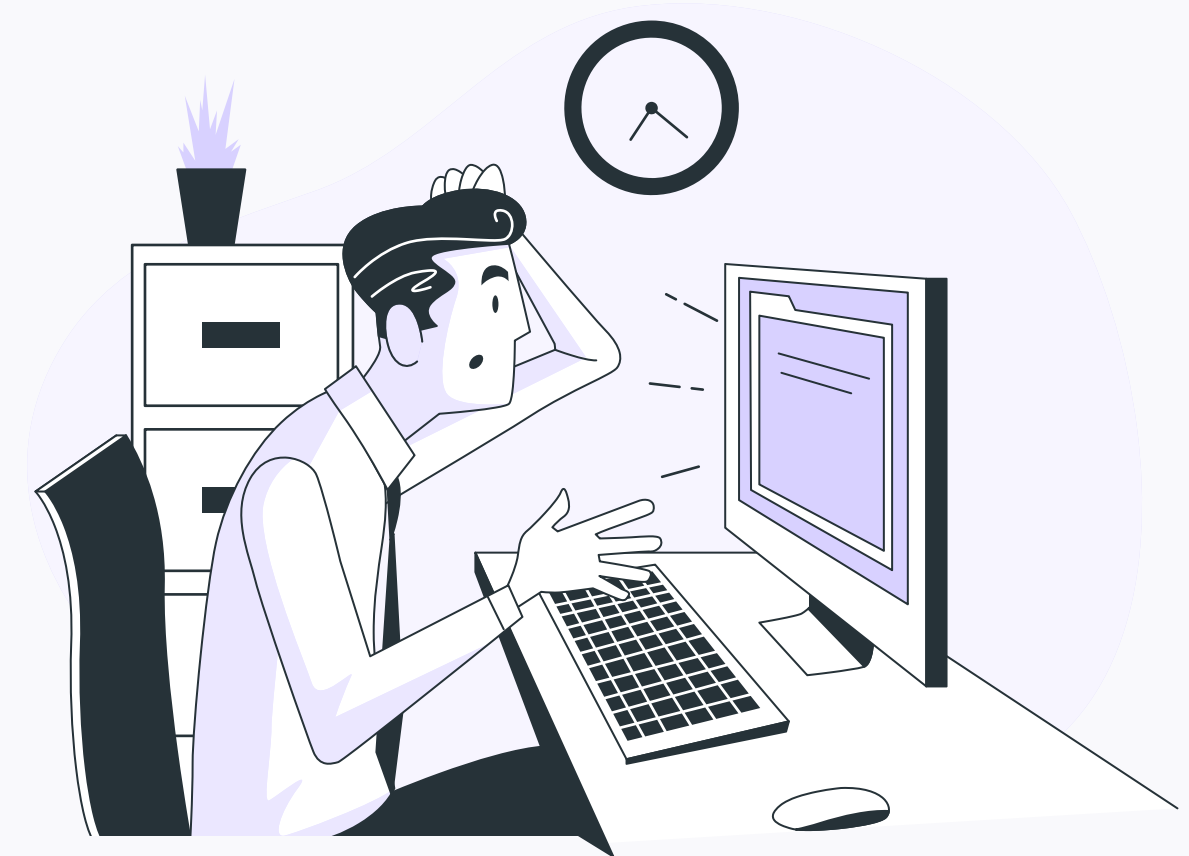
Risk profiler



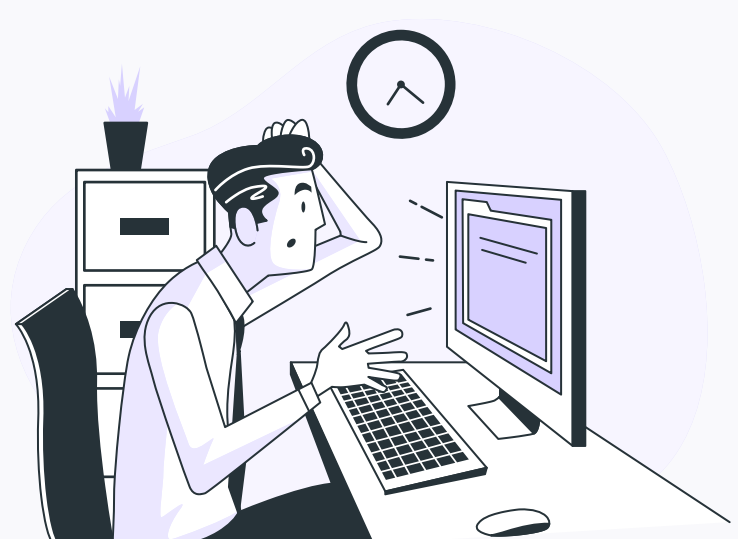
Back office system



Risk profiler



Cashflow modeller



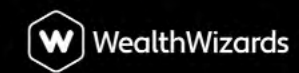


SEPTEMBER 2022

A FRAGMENTEDWORLD.....

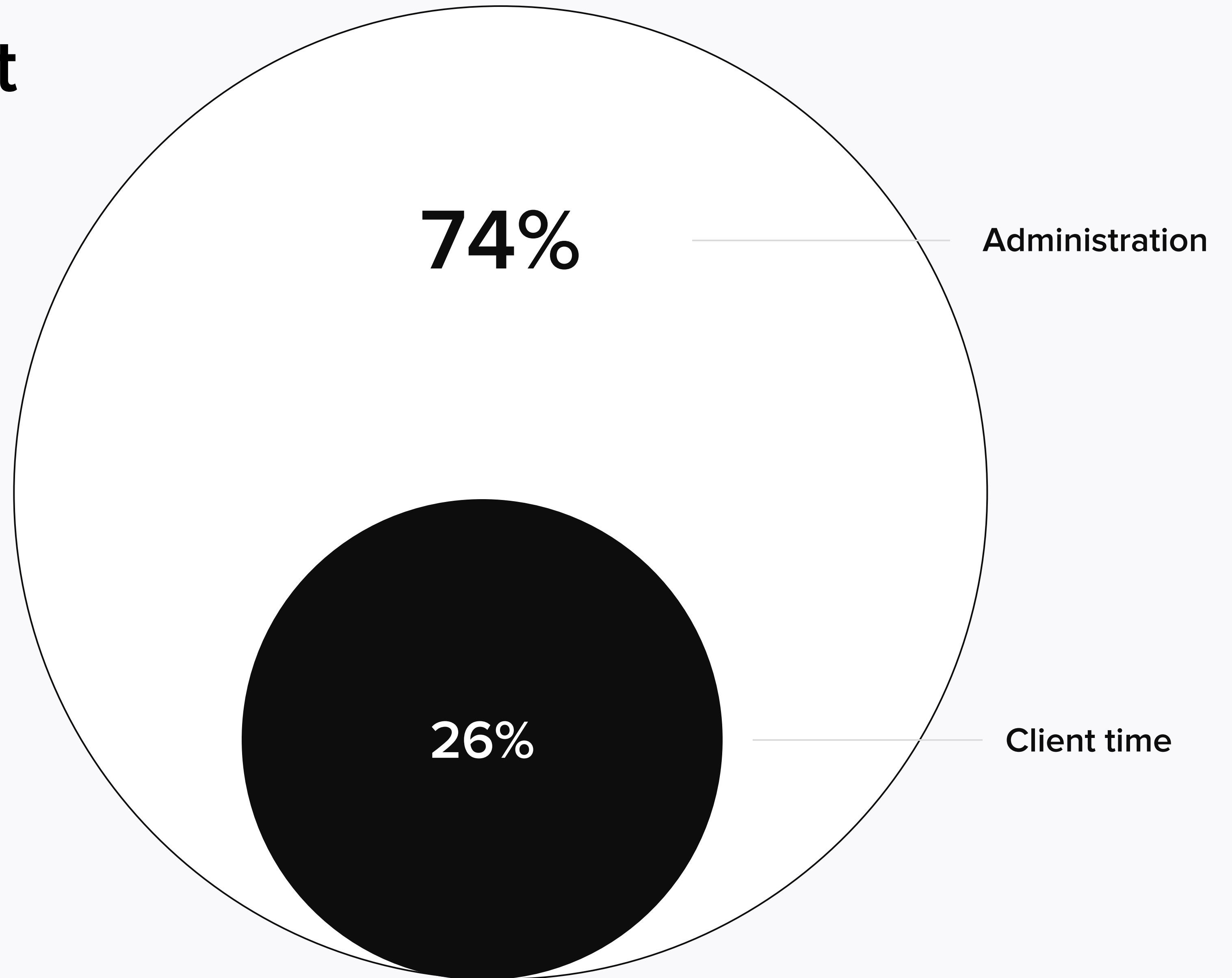


KINDLY SUPPORTED BY



0

Where time is spent onboarding a new client



NEXTWEALTH







timeline
fact find



timeline
planning



timeline
fact find



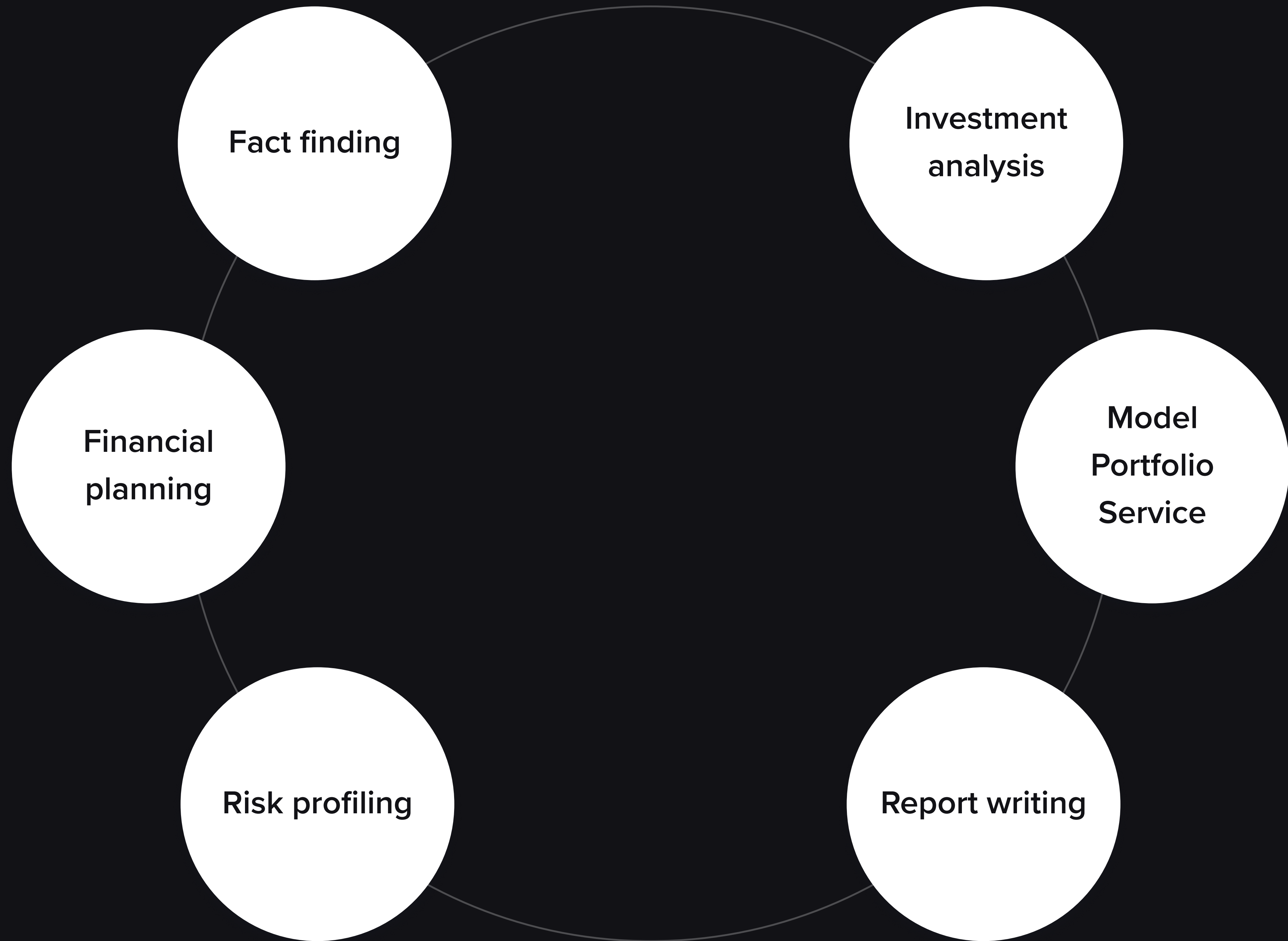
timeline
planning



timeline
risk profiler



Financial planning





Our mission

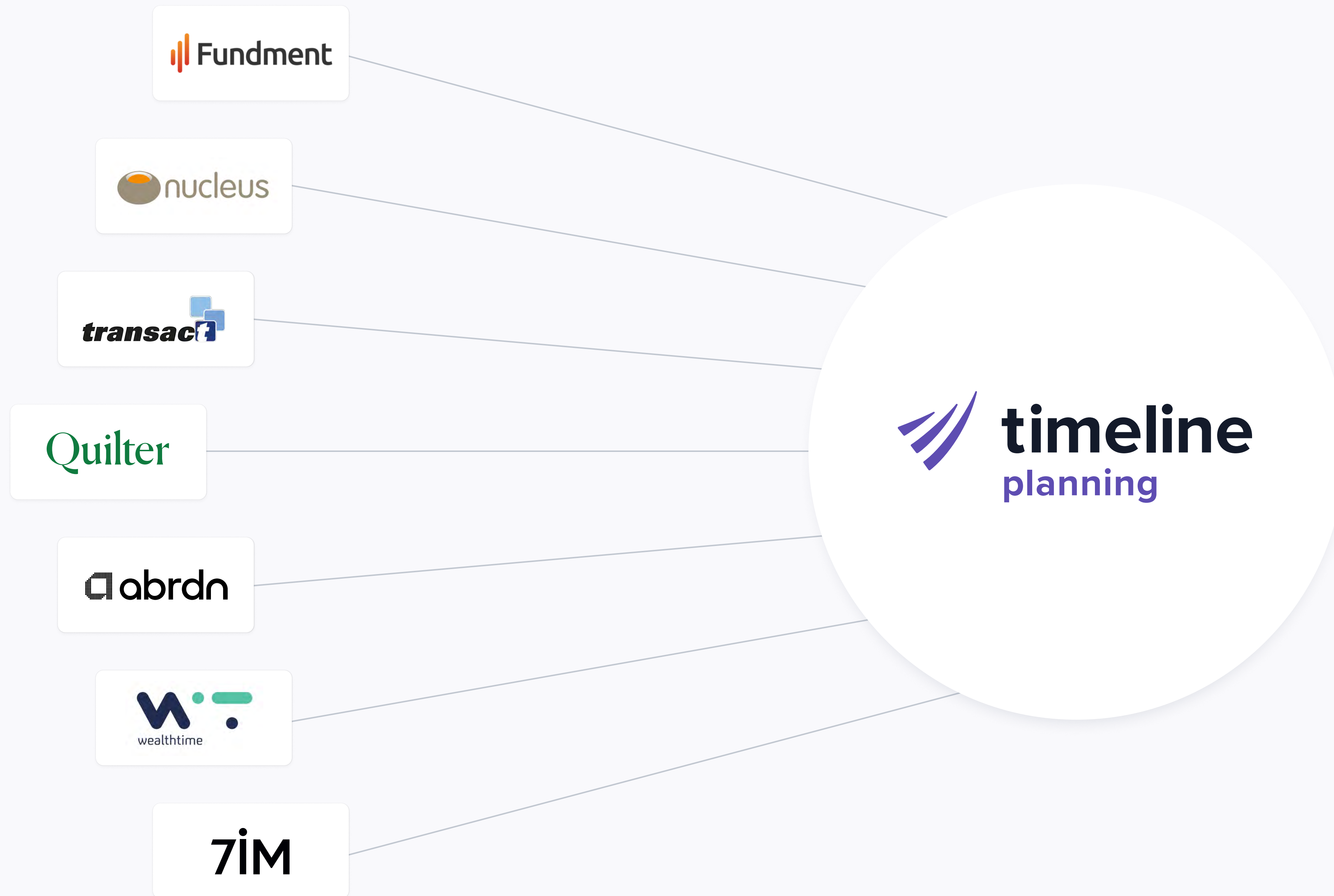
**Making your tech work for you,
rather than you working for your tech**

Efficiencies with the right tech



75%

Reduced administration time





No more re-keying



FE Analytics



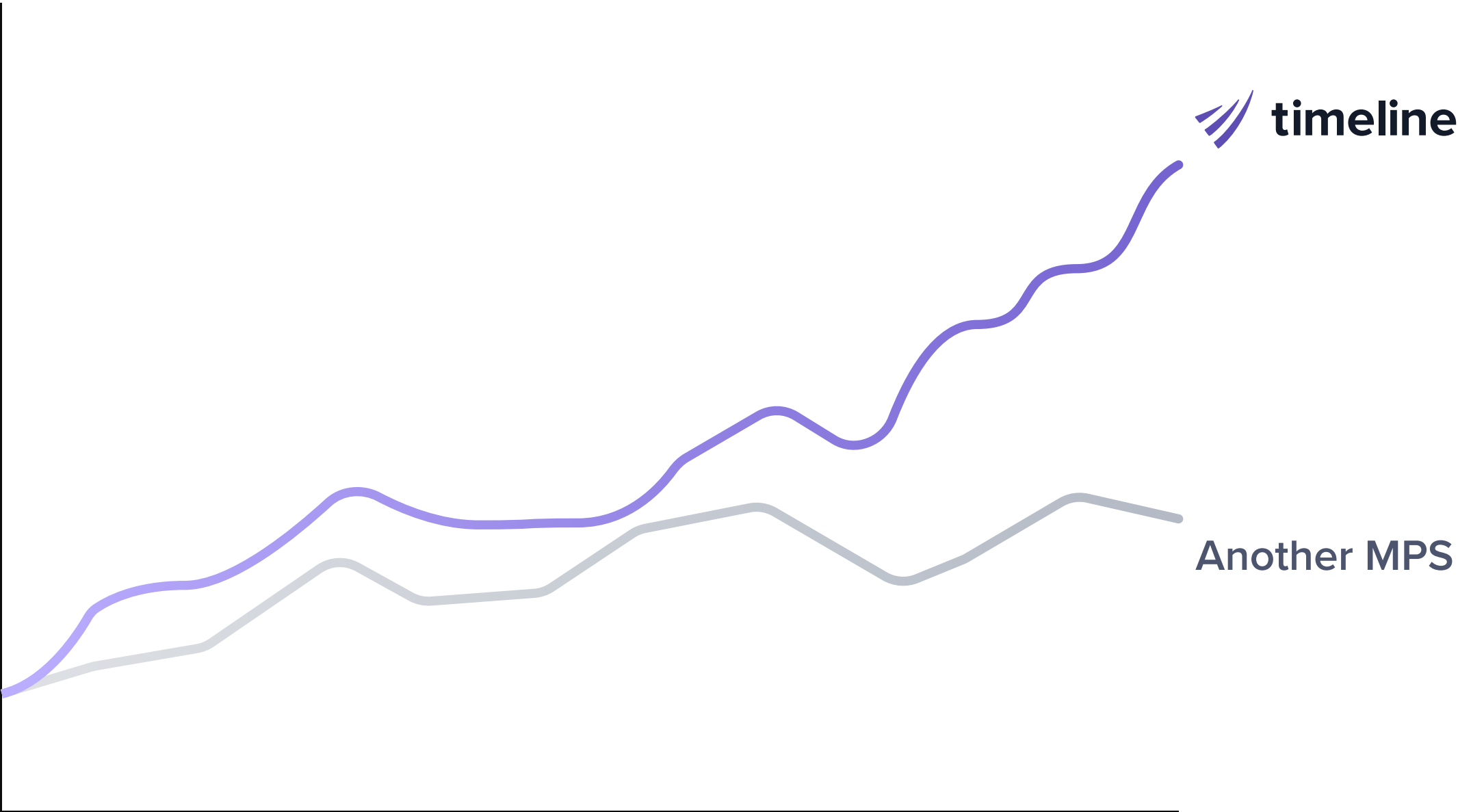
timeline
portfolios



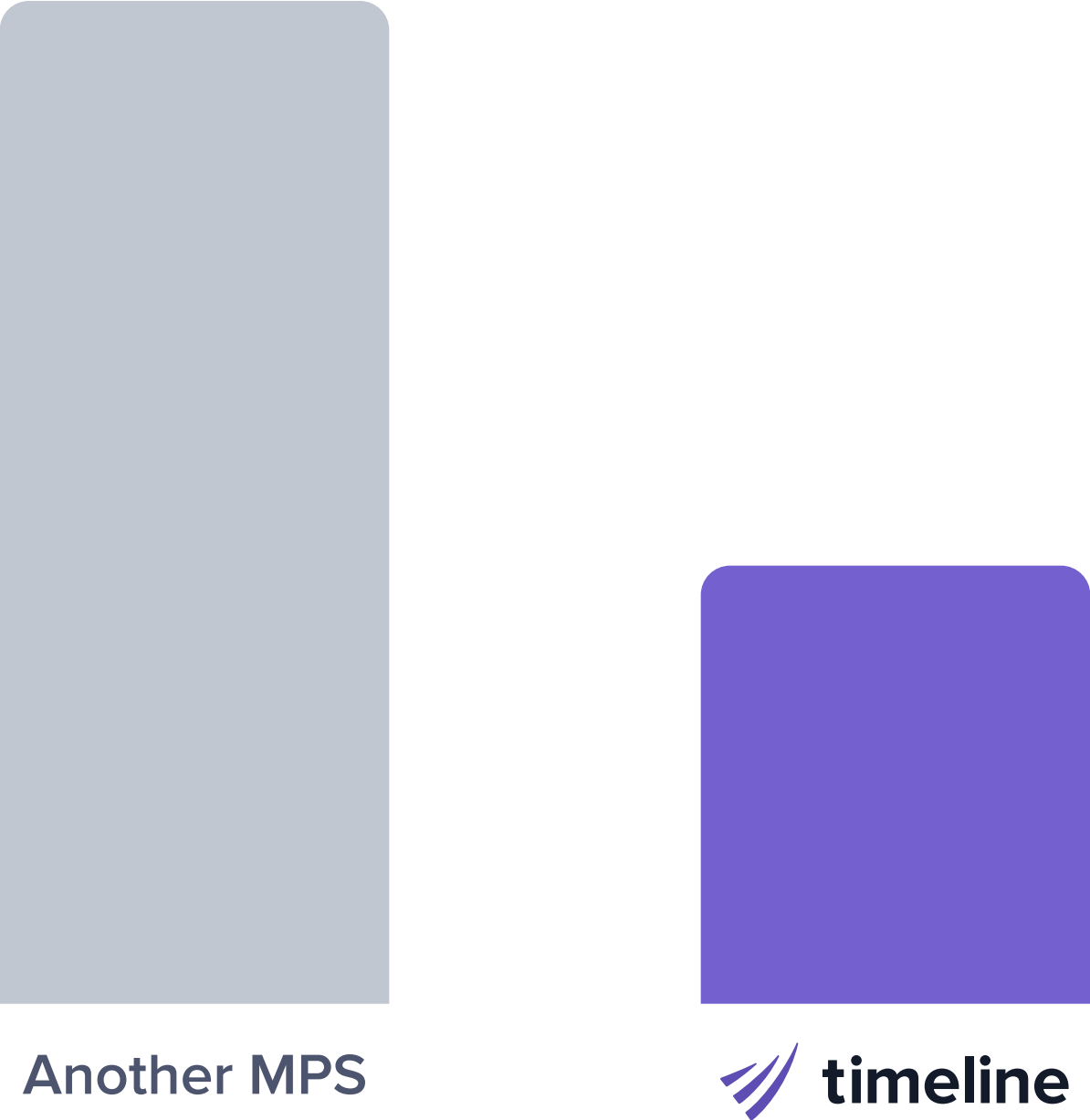
Import in one click

Compare MPSes directly

Performance



Cost







It is finally time for the tech in our industry to
live up to its promise.



See you at the

Timeline Stand

timeline.co