



The Challenge

R C Brown Investment Management is a multi-award-winning investment manager offering individuals, charities and pension funds long term portfolio management run in a rigorous, well-diversified and risk-aware manner.

The majority of RC Brown's clients are introduced by Financial Advisers who are attracted to the firm's active management.

RCBIM recognised the increasing demand for private clients seeking better and simpler access to their own financial information.

However, its primary technology provider Iress was focused on supporting its back-office portfolio management software (Pulse Symphony) and could not satisfactorily demonstrate a strong enough client-facing mobile reporting experience.

The challenge was to seek out a digital partner with integration expertise who can deliver a credible solution at speed, low cost and low risk.



8 weeks
to get a live
working version



Accessible
on all mobile and
desktop devices



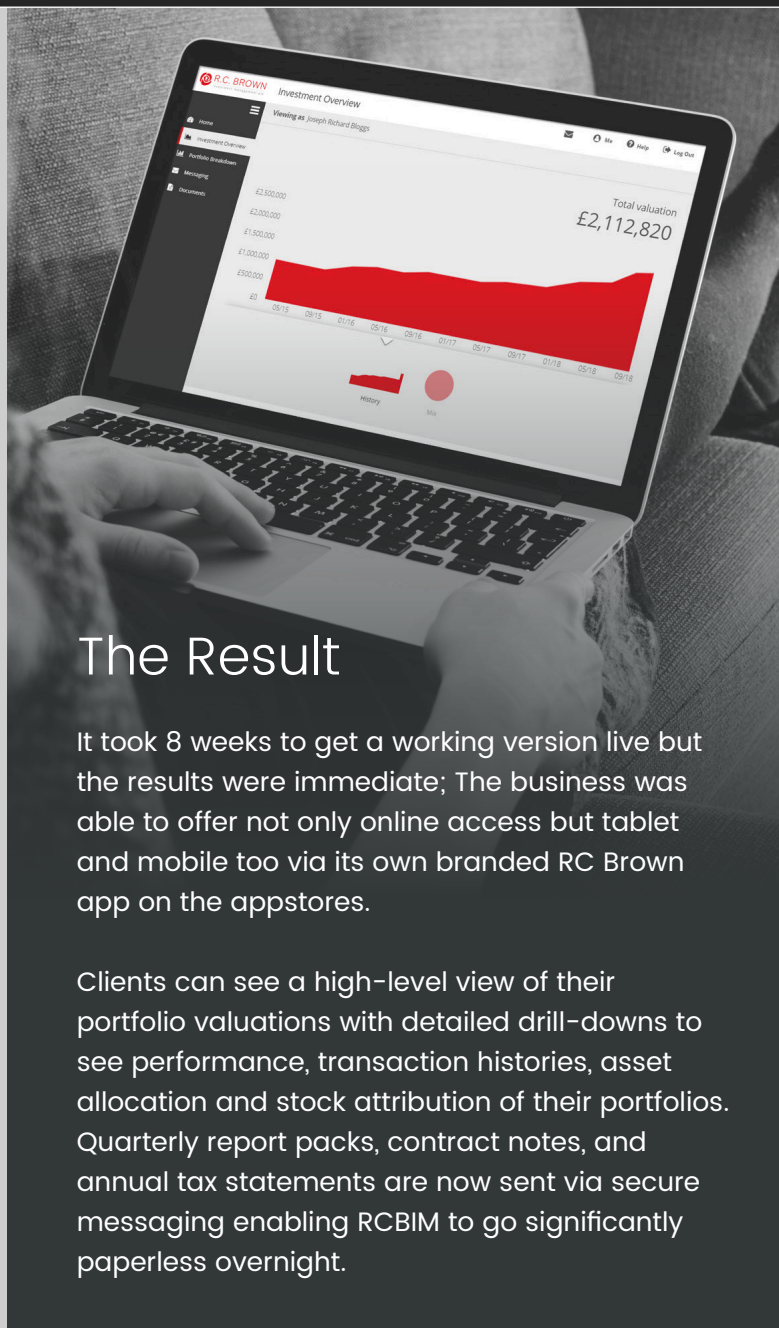
RCBIM became
significantly
paperless overnight

The Solution

We assessed RCBIM's minimum viable requirements within their stated timescales and determined what data we required to make it happen.

We then sent in our integration experts to extract the data and built an integration with the moneyinfo platform.

They were moneyinfo's first investment management client and have helped us develop our client app to offer greater portfolio detail when clients need it.



The Result

It took 8 weeks to get a working version live but the results were immediate; The business was able to offer not only online access but tablet and mobile too via its own branded RC Brown app on the appstores.

Clients can see a high-level view of their portfolio valuations with detailed drill-downs to see performance, transaction histories, asset allocation and stock attribution of their portfolios. Quarterly report packs, contract notes, and annual tax statements are now sent via secure messaging enabling RCBIM to go significantly paperless overnight.

What R.C. Brown had this to say about us:

“

We did have a client portal previous to working with moneyinfo and as one of our clients described it – It's like moving from black and white TV to Ultra HD with how the moneyinfo portal looks compared to the old version.

”

Robert Clark
Sales & Marketing Director

“

We are offering clients something special which differentiates us and at the same time we have cut down massively on our paperwork. In our own case, what we have saved on postage and printing has already covered our annual licence fee, regardless of all the other benefits such as separate tailored views for portfolio performance etc.

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Alan Beaney
Chief Executive Officer