



the Client

Cameron James was established in 2016 and is now managing investment portfolios in 23 countries across 6 continents.

They believe that every expat should have access to regulated and transparent financial advice which is why they provide their clients with regulated advice from UK qualified advisers and offer a fully transparent service with no hidden fees or charges.

the Challenge

What business challenges were you facing before you considered working with Novia Global?

Cameron James is a modern company, and we prefer technologies that make our clients lives as simple as possible, that includes from an administration perspective as well.

Many companies which we worked with previously had an "old-school" approach to processing new client's applications; this meant that our sales process would be longer due to the need to post documents to clients for them to sign, then waiting for the documents to be returned and so on.

"We strive to grow and Novia Global indirectly helps us with this objective every day by providing excellent service and support."

the Solution

What impact has working with Novia Global had on your business?

With Novia Global and their online applications we find it straightforward to get our new clients on board - this saves us a lot of time every time we process an application for our clients.

Some of our operational processes have also actually become totally obsolete, such as posting documents to clients for example. We have adopted the platform approach very well, and we feel that it had a great impact on our processing times. Previously the usual turnaround time of processing client's documents had been 48 hours, now we can offer our clients a speedy turnaround of 12-24 hours from the time they decide to proceed with our advice.

The total transparency of Novia Global, as well as providing clients with online access to view their investments right from the beginning also plays well with our company's virtues.

We initially thought that switching to a platform might be difficult just because of the change itself, but once you adopt the platform it is actually easy to use and the processes of onboarding the clients can be simplified a lot.

We strive to grow and Novia Global indirectly helps us with this objective every day by providing excellent service and support.

get in Touch

To speak to one of the Novia Global team, you can **call us** on **+ 44 (0) 1225 517 517**, **email us** on info@novia-global.com, or **visit our website** at www.novia-global.com