

Client Story

A new financial services network model in the post pandemic era

May 2024





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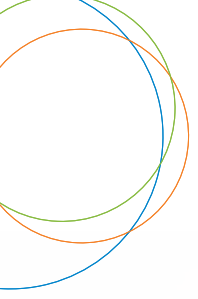
In response to the pandemic, the speed of digital adoption has accelerated sharply within the financial services industry. To meet client expectations in this new era of technology, financial advisers and IFA networks have been compelled to transform the way they operate or be left behind.

Launched in 2021, Lawsons Network was founded to give international IFAs an alternative to the traditional network model, with the goal of becoming the world's leading SaaS IFA network. Encouraging advisers to “plug in and go”, the network specializes in game-changing technology that streamlines every element of the process -from first point of contact to close of business.

Supporting everyone from independent consultants to larger international firms, Lawsons Network's goal is to give advisers in the international arena the freedom and flexibility to grow their businesses independently and efficiently.

Membership is significantly expanding every quarter, with the network already well ahead of its planned growth targets. And with members already spread across 5 continents, the network is fast realizing its ambition to become a premier IFA network on the international stage.





Powered by game-changing, cloud-based technology

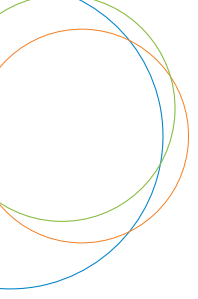
The power behind Lawsons Network' platform is the game-changing technology used to ensure that IFAs have the best tools at their fingertips. To deliver on their promises to their members and enable expansion of the network, Lawsons Network invested in a cloud-based, cost-effective CRM with airtight data protection policies in place. With many financial advisers still a bit nervous about using technology in their business processes, the system needed to be really intuitive. Plus, members are able to work anywhere, anytime, from any device.

Lawsons Network found their unique wealth management needs met by [Salesforce Financial Services Cloud](#) and [Experience Cloud](#) and used [Futureform's](#) Wealth Management template for Salesforce to get up and running quickly.

Members can seamlessly manage multiple client portfolios across diverse currencies and geographies, all from a singular, user-friendly dashboard. The system streamlines processes and eliminates traditional administrative challenges, freeing up valuable time.

Besides the system being scalable, fully compliant, and secure, it can also be easily adapted to Lawsons Network's requirements as they need it to on their quest for growth and innovation in a rapidly changing financial landscape. Third-party solutions can be easily plugged in. [DocuSign](#) was integrated to help automate the document review process to ensure all compliance procedures were followed. And [Ortec Finance's](#) fully integrated goals-based investing solution OPAL allows the Network's members to be very adaptive in their approach, guiding investment decision processes to help clients achieve their objectives. In addition, OPAL helps advisers in monitoring client portfolios and goals at scale, generating portfolio insights, and signaling when client goals are off track.



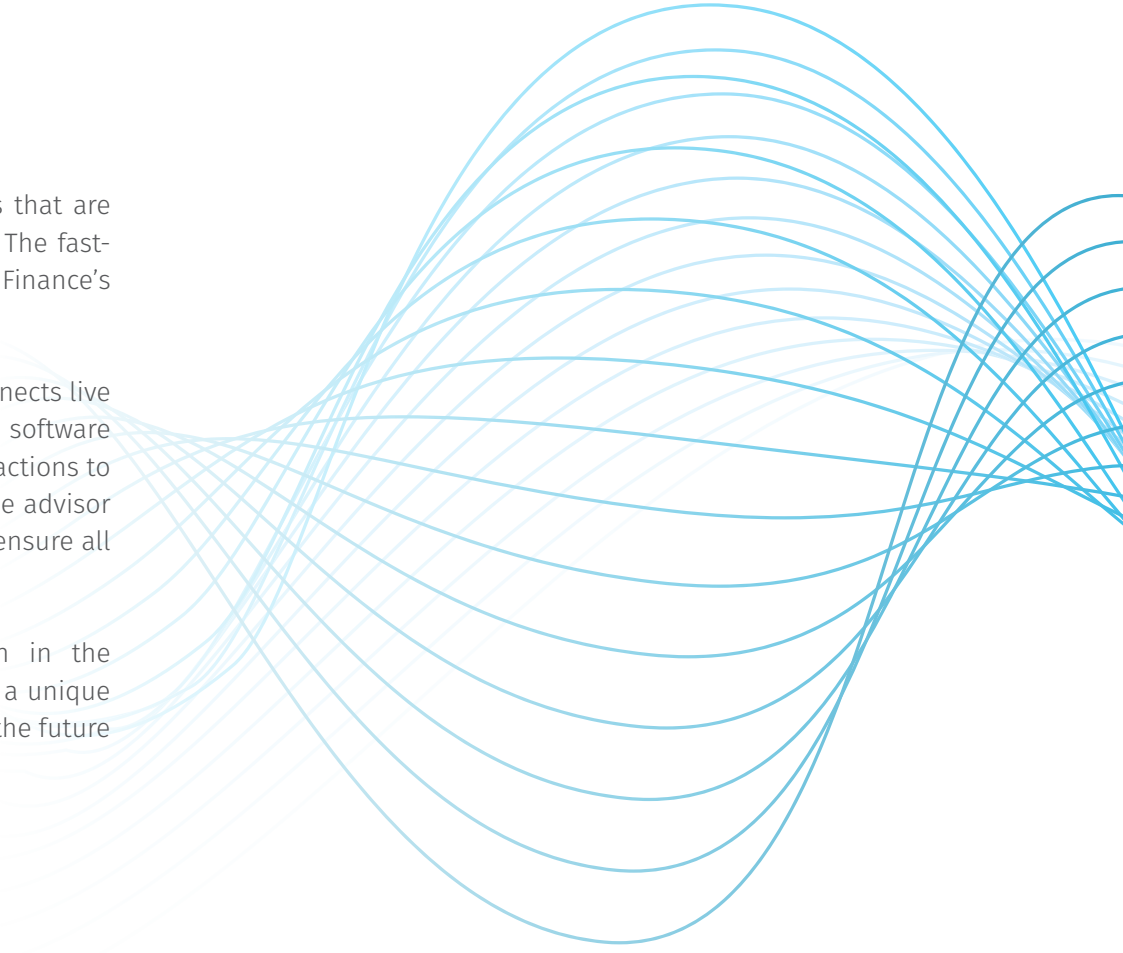


Goals-based investing: power to the advisor

Lawsons Network equips financial advisers with tools and opportunities that are progressive, and efficient, and help boosting members' client outcomes. The fast-expanding range of solutions members have access to include Ortec Finance's integrated goals-based investing solution **OPAL for Salesforce**.

By using realistic economic modeling and current portfolio data, OPAL connects live portfolios to client goals and supports personal goals-based advice. The software updates the goal feasibility based on latest market insights and suggests actions to increase the likelihood of meeting these long-term goals. This enables the advisor to monitor all client goals, across their entire business, and act timely to ensure all goals are tracked and have a better chance to be achieved.

The combination of dynamic economic scenarios used and proven in the institutional market globally and individual client portfolios and goals, is a unique and powerful combination that enables advisors to use a realistic view of the future asset growth to monitor and manage client objectives.





“We have partnered with Ortec Finance to utilise their Goals-Based Investing solution, OPAL for Salesforce. Our primary goal is to help our members translate their clients’ objectives into appropriate investment decisions. This app has provided our network members with valuable insights to support their client advisory meetings tailored to each individual’s unique circumstances and goals. One of the critical features that we like about the OPAL solution is its seamless integration with the Salesforce ecosystem. It allows our members to launch the app effortlessly within the environment where they host and record the outcomes of their client meetings. Moreover, the risk profiling tool, institutional-quality realistic portfolio projections, and visual representation of the comparison view during wealth planning stages provide clients with a clear understanding of what it will take to achieve their financial goals. This feature delivers a true eureka experience that allows clients to evaluate the presented variants and understand the necessary steps to achieve their financial objectives.”, says Sarah Oglesby, Onboarding Director at Lawsons Network.



Implementing the stages of the OPAL Wealth Plan during my client meetings has enhanced my clients' investment journey and made our meetings more interactive and engaging. This approach has enabled us to focus on their investment goals more effectively, resulting in improved meeting outcomes. The OPAL Wealth Plan also provides me with a familiar structure to my client review meetings and I see increased engagement from my clients with more focus on their goals and objectives, things they can control, and less on the month-to-month global economic landscape, something they can't.

Aaron Vickery, Ormiga Capital - Lawsons Network Appointed Representative

The result is more engaged clients, increased client trust, consistent advice and, ultimately, a wealth management business that can scale and grow.

Iwan Schafthuizen, Managing Director Business Development at Ortec Finance: “We are proud to support Lawsons Network in their pursuit of growth as a global IFA technology platform. **OPAL for Salesforce** is the core behind the advisory solution. Client engagement is increased with the goals-based approach for a suitable investment portfolio. By monitoring client goals and updating them regularly with goal feasibility and portfolio projections, clients are attracted and retained. Finally, the advisor dashboard provides the IFA with a powerful tool to efficiently manage client plans and portfolios through call-to-actions.”

With an ethos that champions ease-of-use, first-class service and innovation, Lawsons Network is redefining what it means to be an Independent Financial Adviser in today’s fast-evolving financial landscape.

About Lawsons Network

Lawsons Network is an international wealth management firm that serves as a plug-in-and-go network service for Independent Financial Advisors. Its foundation is built on differentiation: on challenging conventions, embracing innovation, and thinking outside the box.





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Rotterdam

Amsterdam

London

Zurich

Toronto

Melbourne

New York

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