

TOTAL PACKAGE, TOTAL EFFICIENCY, TOTAL PEACE OF MIND

Our Total Plans Solution is designed to remove many of the barriers associated with the implementation of employee share schemes.

Client Services

- › Static data updates and changed
- › Storing historical records e.g. sales, transfers, dividends, static details
- › Assistance with queries - Participants and Trust
- › Deceased estates actions and reporting
- › Termination data and reporting
- › Benefits Statement Production - four times per annum
- › Share sales and transfers with payment advices
- › Reporting on sales and transfers
- › Information on Trust Rules
- › Balancing of register
- › Communications
- › Paying of dividends
- › Suppression of dividends and reporting
- › Maintaining EFT rejections including resubmission of rejections

Value Added Services

- › Over the Counter Trade Services
- › Company meeting services including annual general, general and special meetings
- › Contact Centre
- › Scanning via Workflow
- › Investor Education

We are totally focused on service accuracy, innovation and timeliness and provide a range of services to meet all your requirements