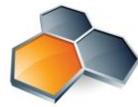




# GMP Investment System Administration for Complex Processes



 **gmp-crm systems**  
www.gmp-crm.com

### Use a GMP Investment systems to:

- ❖ Manage regulated and non-regulated products
- ❖ Manage your sales teams activities
- ❖ Manage enquiries from your website
- ❖ Track prospects until they buy your product
- ❖ Manage sales through the sales process stages
- ❖ Manage agents (or employees) commissions
- ❖ Manage clients yield payments
- ❖ Send clients' investment statements automatically
- ❖ Report HMRC data to help complete returns
- ❖ Manage IF ISA transfers (ISA Managers only)

*\* and much more*

## Sharing information securely

When a team require information it is normally to carry out their own part of the process; yet the information is often late, inaccurate or simply missing.

Real time accessible data is at the core of all the GMP Investment systems functionality.

## Systems that are flexible..

The **GMP Investment** system comes in 3-versions depending on the version you select to satisfy your business needs.

The best way to understand how the **GMP Investment** systems can streamline your business is to talk to us and let us show you how we can help.



## Removing paper processes

The repetitive paper tasks carried out by administrators processing is the first area of risk by transposition targeted when adopting automated functionality.

Simple operational adjustments can bring so many benefits to sales and marketing as well as administration.

## Integrate and save time

The comprehensive integrated processes save so much time, it has to be the single most important reason for our clients' administration teams to use the GMP Investment system.





## Helping You to Get It Right

“We have processed over 3,000 statements for our investment clients receiving interest payments from us this month in only 6-minutes!

This task would have kept the team busy for two weeks before we started to use our GMP Investment system.”

**Katy Eaves**  
 Administration Manager  
 London Capital & Finance

Secure Investment Management



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## Experienced & Robust

Investment systems are very complex made complicated by regulated and non-regulated product sales processes.

The **GMP Investment systems** work in any currency and have in-built features to support the administration process to cope with every combination.

## Managing Post Sales Yields

Managing investment expectations sending regular statements, especially where an investment has yield income payments for many years.

The system also copes with ISA products or those that need withholding tax deductions, all sales are managed simply in the integrated functionality with user-friendly reports to help with tax returns to HMRC.

## Simple Straightforward Discussion

Investment systems are normally very complex, that are made more complicated by regulated and non-regulated sales processes.

Complexity and regulation makes the administrative processes laborious, time-consuming and therefore expensive.

The comprehensive integrated processes already programmed into the **GMP Investment** system save so much time, our clients use the functionality benefit from huge efficiency gains.

Our process has the ability to personalise both the sale progress stages and the message content used to communicate with clients.

Contact us on **01740 625204** today to discuss how our systems may be able to help improve the administration processes to reduce time and cost from your business.

No guarantees on whether we can save you money or time, however, we can make a promise not to waste your time if we know we can't help you.



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Make a great decision today .. Call 01740 625204 now