

“Novia Global not only helped to reduce the administration burden, but also reduced the costs for the end client...”



Sam Barber
Director

sjb-global.com

the Client

SJB Global provide financial planning to expatriates living in over 100 countries worldwide and were awarded the “Best Adviser Firm Established in Under Three Years” by International Adviser in 2020.

Their mission statement is “*always act in the client’s best interest*”

SJB Global are completely telephone based, meaning they are able to advise clients globally and only recommend non-commission-based investment funds to ensure their fund selection is completely unbiased and in the best interest of the client.

the Challenge

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

When comparing the offshore market to the UK market, it is clear what challenges advisers face:

- > a lack of transparency through commission paying products and funds
- > the trustee and platform provider are often different firms which typically causes delays along with a complicated process of changing funds and requesting withdrawals
- > the products available to the offshore pension market were very expensive and paper-based as opposed to being online - as most businesses are these days

the Solution

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

SJB Global believes in automation and efficiencies, which in turn reduces errors and frees up time for advisers to focus on their clients. Novia Global have integrated a seamless online application process that is really simple to use and is completely transparent, meaning there are no hidden costs that the client might not know about.

Novia Global was one of the first product providers to offer a SIPP trustee and platform provider under one roof which not only helped to reduce the administration burden, but also reduced the costs for the end client and allowed firms to operate in a transparent and integral way.

Dealing is done online, which further reduces delays. Therefore, communication errors between advisers and product providers cease to be an issue. Ultimately, this gives the adviser more time to focus on servicing existing clients instead of chasing providers to place trades.

Novia Global also allow the adviser to place trades, this initially increased the responsibility burden on us, however with their oversight authorisation functionality, it allowed management and advisers to work together to ensure trades are always placed correctly – there is no long-term gain without short term pain.

The Novia Global platform does what it says on the tin; there are no hidden surprises, no tie in periods or exit fees, and it can cater for any client who has a change in their needs or objectives, this is ever so more important in a constantly changing world.

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 sales@novia-global.com, or **visit our website** at www.novia-global.com