


OPEN DOOR POLICY : WHAT'S IT ALL ABOUT?



Financial Services is heavily regulated



There's a lot of moving parts. They all affect each other

Hard disclosure

MiFID II

RDR

Consumer Duty

PROD

CIRPs

Charges

Research

MAKING IT ALL WORK : THAT'S WHERE OPEN DOOR POLICY COMES IN.

WHAT DO WE DO?

It's easy to review Regulator expectations and produce a report on how a firm would meet them, with a recommended list of actions. Opens Door Policy goes further. We work with firms to build and document their unique solutions.

HOW DO WE DO IT?

We start with the goals of the firm. With 10 years' worth of experience over hundreds of consultancies we know what good looks like. Each proposition is project managed to ensure it is completed in agreed timescales and to the highest standards.

Modules

Building Charges, including Price and Value
Building a CIP and a CRP (combined CIRP)
Consumer Duty Proposition
Update and Reset Service

YOUR BUSINESS : YOUR CHOICE

Knowledge

Analysis : Making sense of the guidance
Creating: Guides on building a CIRP, charges and the Consumer Duty

NO PRODUCT PUSH : ALL KNOWLEDGE

Delivery

Module Packs : Emphasis on self-learning
Guided : Online seminars with back up
One to one : Dedicated one to one consultancy

YOUR LEARNING : CHOOSE DELIVERY

Cost / Work

Module Packs : Less cost more work
Guided : Equal cost and work
One to one : More cost less work

YOUR WORKLOAD : YOUR BUDGET

Website



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