

17 November 2020

LETTER OF RECOMMENDATION

Varria has been working with Paperwork Magic for just under a year. Like many within the financial planning industry, it has been an exceptional time of change.

When we first engaged with Paperwork Magic we were 4 months behind on paraplanning due to multiple acquisitions and the increased licensee compliance and vetting regime. Paperwork Magic have allowed us to completely restructure our internal paraplanning team resulting in new roles and active engagement within the team. We are now able to service our client's in the manner we wanted, with very short turnaround times and quality plans.

We have worked with Allison Hays and the Paperwork Magic team to systemise the outsourcing of all paraplanning requirements. This has included the way in which we request the plans, file noting, plan approval process, queries between paraplanner and adviser, templating and formatting so that the document meets the high standard we required for our clients. We can now give back to our clients with more active face to face meetings ensuring we meet their financial needs.

I would highly recommend Allison and the Paperwork Magic team.

Yours sincerely,



Clare Sanderson MBA(HRMgt) MAICD
Chief Operating Officer