

# “Parmenion has enabled us to become more efficient...”

## Case study

### Church House Investment Management



#### Key contact

Mr Sam Liddle  
Sales Director

#### Location

Sherborne  
& Mayfair

#### Website

[www.ch-investments.co.uk](http://www.ch-investments.co.uk)

#### Using Parmenion since

May 2015

### About Church House Investment Management

Church House Investment Management (Church House) is a private fund management company that offers discretionary portfolio management to private individuals, family groups, trusts and charitable foundations.

Church House focuses on risk management and the provision of returns to match their clients' reasonable expectations and appetite for investment risk. They focus on building long-term relationships with clients and their families which requires a genuine personal service.

Church House is an independent company established in 1999. It is authorised and regulated by the Financial Conduct Authority.

### Note from Sam Liddle, Sales Director, Church House

'It was a simple choice for us to select Parmenion in response to the growing demand for access to our bespoke portfolio service from the intermediary sector. Having carefully constructed our CH Advantage Managed Portfolio Service (CHAMPS), we were drawn to Parmenion for its award-winning service, discretionary fund management capability and innovative technology. Parmenion has enabled us to significantly reduce the time spent on operational processes and meant we can focus more resources on delivering additional value to our clients and intermediaries. In short, using Parmenion means we can offer a full managed portfolio service without increasing operational risks within our business.

From the outset, Parmenion was extremely proactive and keen to build a solution that was right for us. The team had many ideas about what could meet our needs, and were amenable and open to suggestions. They have definitely been the ideal partner for us.'

### What business challenges were you facing when you elected to consider Parmenion as a partner?

Our challenge was working out how to make discretionary management affordable and accessible to a broader range of clients. To do this we needed to develop and deliver a lower cost discretionary managed solution, that was powered by a more efficient and scalable infrastructure than our current operating model. The high level of investment required in technology to make this vision a reality made outsourcing the right decision. Furthermore, once the decision was made, we were able to be live with our new proposition in a matter of weeks.

### How has Parmenion supported the development of your business?

Parmenion has helped add value to our business throughout the process. Our experience and engagement has been very positive on both the operational and business development side of things. As we transitioned to Parmenion, the team were very helpful in training our staff and implementing the service.

Get in **touch**

To speak to one of the Parmenion team, you can call **0345 519 0100** or email [mail@parmenion.co.uk](mailto:mail@parmenion.co.uk)

## How has Parmenion helped to secure your business objectives?

Parmenion has enabled us to broaden our client value proposition by offering a managed portfolio service, CHAMPS, that compliments our bespoke offering. As a direct result we can appeal to a wider market and grow our revenues. Outsourcing to Parmenion, an investment solutions and technology business, has allowed us to manage costs and provide a better service. As the Parmenion proposition develops we hope to be able to take advantage of enhancements and provide further value to our clients.

## What were you looking for in a partner?

We were looking for a partner who would spend time understanding our business and clients, and then work out the best solution for us. Parmenion were very accommodating and proactive at all times. They made it easy to do business.

## How would you summarise the benefits of delivering an investment proposition powered by Parmenion?

The benefits to our business have been a reduction in risk and an increase in efficiency across our processes. It means we can expand our proposition safe in the knowledge that we have the infrastructure to deliver a compelling client experience and support our growth for years to come.

## How have you been able to develop your proposition as a result of partnering with Parmenion?

CHAMPS is an offering we are able to provide to our own clients and the clients of the professional intermediary market. As the proposition is powered by Parmenion, we believe that this will be a strong advantage for financial advice firms, who already acknowledge the strengths of its technology and administration services.

## What have been the impacts on your operational processes?

We have been able to save a significant amount of time on our operational processes which has resulted in us freeing up staff to focus on activities which improve the client experience. Outsourcing has also helped manage some of the process risk involved in offering a B2B2C service.

## Why did you choose Parmenion over a number of potential partners?

Parmenion offers a tried and tested solution that we felt was right for our business. Its service combines an award-winning platform and intuitive technology. When matched with the enthusiasm and capability of their people it was a simple choice and a good fit for Church House.

## Get in touch

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To speak to one of the Parmenion team, you can call **0345 519 0100** or email [mail@parmenion.co.uk](mailto:mail@parmenion.co.uk)

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