Case study

Blick Rothenberg is a leading firm of chartered accountants with particular experience in UK trusts and high net worth individuals. They pride themselves on building long-term relationships with their clients and as a supplier we share many of their values. Our relationship with them dates back to 1995.

Leo Joyce, Trust Director, Blick Rothenberg

"We have been using Troika for over ten years now. As chartered accountants, it's natural that we insist on systems that have solid bookkeeping behind them. We also benefit from thewealthworks' understanding of trusts and trust accounting. It is these two factors that have led to our long-term relationship with Troika".

Background

Blick Rothenberg had been advising executors and trustees on family wealth planning for many years and decided it was time to update their legacy system.

Our Brief

- To provide a core bookkeeping system for a range of trust, estate and charity clients with full training and installation support
- To develop a tailored range of formats and training for users to customise for specific client needs
- To develop a customised investment report for inclusion in the accounts pack
- To streamline and integrate processing of client reporting to improve the efficiency of the department

Our Solution

Blick Rothenberg uses the Wealth Management module for their accounts production and bookkeeping. The installation overheads were minimal (three day's training and two day's installation). Processing costs were reduced considerably and because the system uses standard Microsoft tools, it has proven to be completely future proofed.

The result

"Troika is our key system within the trust department. We have a broad range of clients, some with very specialist needs. We therefore needed a package that can capture basic data, but is flexible enough so that we can apply our individual expertise to tailor it where we want to".

e: info@thewealthworks.com
t: +44 (0) 1444 401333
w: www.thewealthworks.com