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4th June 2020
Our Ref: ADLS/SEL

CV 19 UPDATE: SWALLOW FINANCIAL PLANNING

Now we are in week 16 of the current crisis I thought clients would like an update from Swallow Financial Planning.

I am delighted to confirm that we are on track to re-open the office on Tuesday 23rd June. From that date we will have staff in the office from 9am to 5pm every weekday albeit that we will continue to combine home and office working to ensure we maintain “social distancing” and to safeguard our vulnerable employees.

For those who do not know our administration offices in Ipswich, we work in an 18th century grade 2 listed building. This has its challenges, however the fact that it isn't a modern single storey cavern is an unexpected bonus when social distancing looks likely to remain for many months.

During the next few weeks, we will be moving workstations to make best use of the 3 storeys. This will enable staff to work on different floors with the minimum of close contact. we are also installing the paraphernalia of a CV19 working environment. Electric hand dryers and paper towels are now a requirement.

Our new back office system has now gone live which will make a huge difference in the longer term but entails a great deal of work at present as we try and bring individual clients data up to scratch. The cloud nature of the new system is a godsend when it comes to working from both home and office.

A further consequence of the CV19 work patterns is that we are no longer reliant on a paper record system. 95% of our advice and communication is now via email. Our Dropbox system ensures clients can maintain their written advice in a secure place. For those clients who prefer it we can provide password protected PDF files. During the last few weeks, we have had to adapt current systems so that emails, letters and reports are available to staff working at home. Longer term, we hope to be able to combine all clients records within the back office system which will also give clients their own file storage area.

We are continuing our annual review and investment review processes. Hopefully with the return to work the delays we have been suffering will gradually reduce.

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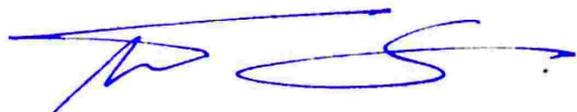
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Swallow Financial Planning Limited Liability Partnership is a chartered financial planning practice, the firm is authorised and regulated by the Financial Conduct Authority. The firm is registered in England, No. 0C303870
www.swallow-financial.co.uk

I hope you are all keeping safe and well. As usual if you have any queries or questions about the changes we are making, then do contact your adviser or regular staff contact.

With best wishes



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