

Grimsey looks to the future with technology partnership



Grimsey Wealth is dedicated to bringing our clients the best services possible. Our desire to keep ahead of the curve created the need to look at what we were providing our clients along with what we could do to make our client offer the best in the business. In the current environment, technology plays a vital role in communicating with our clients and being able to bring them the most up to date information. This need to ensure we can continue to provide the best for clients has resulted in our new partnerships with several software providers. These relationships have created the ability for the Grimsey Wealth team to offer clients seamless connectivity. We can now provide clients a continuous flow of accurate reporting which occurs by having the client, Grimsey and any third party connected to provide the latest information flow.

The way this information is able to be updated so quickly is by a reliance on the “Cloud”. The cloud is a platform to make data and software accessible online anytime, anywhere, from any device. This literally means that as your financial advocate, Grimsey can access any information required for your financial benefit within moments. The ability to do this means that the processing of reports, taxation, banking & finance and many other of our services will be provided to our clients in a more time effective manner. The clear benefit of Grimsey’s relationships with software providers for your financial services is that we have a clear overview of your current financial position, in real-time. This in turns means we can provide this to you and your business.

What we can do better for you with our partnership:

1. **Reporting** - Report on the things that matter, with financial and management reports that help you make better decisions
2. **Tax** – Provide you with a more efficient tax and business activity statement process
3. **Cashbook** - Help you to manage your cash while we manage your books, using the same data anytime, anywhere.
4. **Workpapers** – We are able to provide you with assistance with your business compliance accurately and timely. The Grimsey team also has the ability to prepare your financial statements and accounts more efficiently

As with any new form of technology, the Grimsey team has done the due diligence to ensure the security and protection of our client’s information was maintained. As a client of Grimsey, we want to ensure the safety of your personal information. The cloud is one of the most secure ways to store information. For example, using cloud software, if your laptop is stolen, no one

can access your data unless they have a login to the online account. Our Grimsey team will continue to ensure the protection of your financial information through this process.

We look forward to continuing to work with our clients in a more timely and effective manner moving forward. Our goal is to continue improving and offering our clients the best services available. If you have any questions about our new financial services platform please don't hesitate to contact us on (03) 8341 8888 or email us at client.services@grimsey.com.au.