



**April 2010**

**Mercer & Associates select B2 Business Systems  
to streamline their client document management process and support  
their growing IT Network.**



Mercer & Associates Wealth Management Ltd are Financial Advisors in Chester, who work with private clients, business owners, and entrepreneurs helping them with all aspects of wealth management planning.

Their diverse and rapidly growing client base means that the firm's professionals draw on a vast array of content ranging from financial & tax records, to audit guidelines and legal documents.

Prior to working with B2, this content had existed mainly in paper form — creating challenges for the firm, for storage, retrieval and physically transporting files along to client locations. Electronic content such as emails were not easily linked to the paper trail.

“We simply had to meet the challenge head-on” says Darren Mercer, Owner. “Working with B2, we developed an IT Strategy, which included building the network, and implementing a document management solution for scanning, and indexing to client records. This provides us with a fresh approach to records management, compliance and retention, and also benefits our clients”

Client's records can now be securely accessed in the firm's Chester office or on client's premises. Darren has seen tangible benefits, “By centralising the storage on one system this has increased our ability to respond to client requirements more efficiently, with instant access to critical documents and furthermore it provides us with a full audit trail” B2 also provide a complete end to end support service for the network, document management, and office applications.

Paul Rutt, B2 Managing Director is delighted that Darren and his team have been able to get real benefit from this project; Paul commented "The change that Darren has made is making a big difference to the way that client records are handled, but it is not only the process it is the whole approach to business continuity, with all client records now securely archived"

#### **About Mercer & Associates**

We are very passionate about building long term relationships with all of our clients founded on trust, excellent service and superior wealth management planning.

We look after Private Clients, Owner Managed Businesses and Entrepreneurs, and pride ourselves on basing our advice on our strong ethical and moral values and a desire to genuinely look after people and help them understand complex financial planning matters in a simple and pragmatic fashion.

It is our personal goal to help all of our clients plan holistically, considering everything from ensuring they and their families/businesses are protected, to ensuring their investments and pensions obtain superior returns, to asset protection and tax mitigation. In simple terms, "Holistic Wealth Management Planning", which is tailored for the clients in question based on current Government legislation.

To request a weekly market bulletin (email distribution) or a free quarterly investor magazine - please contact us on 01244 394203.

[www.mercerandassociates.co.uk](http://www.mercerandassociates.co.uk)

#### **About B2 Business Systems Ltd – Microsoft Gold Certified Partner**

Established in 1991, B2 is an independent IT solutions and services company, providing business solutions, flexible support contracts and project services: - focused around our core Microsoft competencies. The company has significant expertise in all aspects of local and wide area networking and communications, from the smallest, to largest of scales.

Having access to an IT specialist is critical to the success of any business. Our IT specialists provide our customers with the expertise they need, when they need it.

Many of our customers benefit from reduced costs by using our IT Partner model.

B2 addresses the IT needs of our customers, whilst ensuring that the skill sets are optimised to deliver tangible results and a complete front to back solution for our customers.

***For additional information, please contact***

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