

QuonWarrene



QUONWARRENE

Expertise for financial services

The QuonWarrene Spot-Audit™

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We examine the current state of your technology and help you make key decisions. Powered by the methodology used in our Blueprint and Concierge services, we focus in on a priority you define for an expedited report offering advice and recommendations. Our methodology starts with a questionnaire and a conference call during discovery. We consider several factors, including: Network and Internet connectivity; The systems and devices you use; Your team and how you work, both in and out of office; Practice management tools you use for managing your business; The service providers you leverage.



The Spot-Audit™ Report

Your report provides specific feedback on our discovery, including recommendations for changes to procedures while also advising on possible apps or providers who can help you continue to streamline without disrupting productivity or the client experience.

Examples of Spot-Audit™ use include:

- Assessing security and privacy in light of new FINRA & SEC priorities
- Choosing a new service provider, such as CRM or financial planning solutions
- Strengthening backup and business continuity capabilities
- Creating a more portable and mobile office
- Any operational challenge you face, we can help

Contact Us For A Spot-Audit™ Today

QuonWarrene brings a keen eye toward growing your practice's operational and technical capabilities. This directly benefits you and your clients. We understand the critical nature of relationships and approach technology as a meaningful element of freeing your time to interact with your clients.

The Spot-Audit™ has three steps to completion:

1. Our questionnaire for a view of your current systems & use of technology
2. A collaborative conference call to understand what you like (and don't like) about your current situation
3. QuonWarrene provides an assessment report score carding your current technology with our recommendations

About QuonWarrene

We believe our diverse range of personnel brings creative skills, thoughts, and ideas to the table. Practice management is at the core of running and growing your business efficiently and profitably. It embodies your philosophy, business processes, staff, product mix, systems and more and we our services can help build your practice.

Neal Quon and Blane Warrene founded QuonWarrene in 2009. The two have spent their careers in the financial services industry, bringing a combined 'street smart' front office and back office expertise to the firm. The two saw a significant gap emerging as technology took center stage and have designed a methodology for unlocking the quotient in a financial business.



QuonWarrene
201 N. Harbor Blvd., Suite 201
Fullerton, CA 92832
Tel - 888-266-9005
Fax - 866-380-4063
Web - quonwarrene.com
Email - info@quonwarrene.com