

Built by Financial Planners for Financial Planners, PlanHappy brings 'all-in-one' back-office software to market

PlanHappy will support Financial Planners and Advisers with a range of back-office, training and business support services

TEESSIDE, UK, February 9, 2024 /EINPresswire.com/ -- A new 'all in one' technology solution to support Financial Planners and Financial Advisers nationwide has officially launched to market.

Along with full back-office tools and functionality, PlanHappy will provide access to training and development, one-to-one coaching, as well as a range of business support services for financial planning professionals across the country, through its purpose-built system.

A digital revolution in financial planning

The brainchild of Joslin Rhodes CEO Neil Parker, PlanHappy is the culmination of more than two decades of financial planning experience. As a Financial Planner, Neil felt that the systems for the industry often fell short.

"PlanHappy was born out of frustration," Neil explained, "As a Lifestyle Financial Planner, the existing software available just didn't do what I wanted it to do."

For Neil, PlanHappy is the final piece of the puzzle in elevating the industry as a whole - tech designed and built by Financial Planners, for Financial Planners.

PlanHappy not only empowers Financial Planners to run their whole financial planning business on one system, it also focuses on helping them build and grow their practice while delivering the best outcomes for clients.



Neil Parker, Founder and CEO

Through PlanHappy's three training courses, including the flagship PlanHappy Lifestyle Financial Planning Process, Financial Planners have access to hundreds of hours of Continuing Professional Development (CPD) content as well as personalised one-to-one coaching.

An industry-wide boost through expert training

At the heart of PlanHappy is the unique PlanHappy Lifestyle Financial Planning Process that turns traditional financial advice into a true 'coaching, planning and advice' service for a more human-led approach and better customer outcomes.

With a unique approach, led by one-to-one online coaching and 280-modules of CPD course content, PlanHappy hopes to play a pivotal role in elevating the industry as a whole, setting a new standard for financial planning excellence.

"Continuous professional development has to be at the heart of truly effective financial planning," Neil explained, "Understanding the financial landscape and evolving client needs is one thing. But to be truly ahead of the game, a successful Financial Planner should always be looking to hone their craft and not make the same mistakes as many before them have."

Practical solutions to industry challenges

PlanHappy Software helps financial planning professionals provide a holistic and thorough service to clients. For Neil, the nature of Lifestyle Financial Planning requires a more bespoke approach. "Life isn't a straight line - it's a collection of unique chapters," he explained, "As Financial Planners, we need to reshape the linear forecasts to mapping life's journey."

In addition to the PlanHappy Lifestyle Financial Planning Process, the technology offers support for financial planning professionals to expand their skill set and build a business of their own, as well as one-to-one coaching sessions - all available through one system.

The man with the plan

PlanHappy's founder Neil Parker is naturally passionate about pushing boundaries within the industry, having found his own niche through an unconventional career route.

Leaving home at 16 to be a chef, Neil moved on to establish a successful career in civil engineering managing multiple projects across the UK during his time at Cleveland County Council, Northumbrian Water and Insituform.

After entering the financial services industry at age 26, Neil launched Joslin Rhodes, which has grown from a one-person operation into a £200m FUA business with 60 staff.

The firm's growth trajectory looks set to continue, with Joslin Rhodes recently named as one of the region's fastest growing businesses in the Ward Hadaway North East Fastest 50 2023.

Neil has spent a decade developing the PlanHappy Lifestyle Financial Planning Process, and the PlanHappy Software has been in development for close to seven years. Following the success of its three-year beta phase, PlanHappy Software is now being launched to support the wider financial planning community across the UK.

PlanHappy as the future of financial planning

For Neil, PlanHappy will be instrumental in supporting Financial Planners to ask their clients the 'big questions', finding out what matters to them, and helping them to plan for a prosperous and secure future.

"PlanHappy is the next step not only for me but for financial planning as a whole," he explained, "With the right support and tools, we can help Financial Planners and Advisers across the UK take their financial planning practices to the next level."

For more information visit: <https://planhappy.co.uk/>

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