

HOW LAILLET BORDIER ACER FINANCE SUCCEEDED TO PROCESS IN MASS AND QUICKLY THE ADMINISTRATIVE TASKS OF ITS 2600 CLIENTS IN LIFE INSURANCE

LB&AF
Laillet Bordier Acer Finance
CONSEIL ET GESTION PATRIMONIALE



Retour d'expérience
Alexandre Lemare
Directeur général LB&AF

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*The Hokus Platform
has exceeded our
expectations!*

ACTIVITY : MANAGEMENT COMPANY
EMPLOYEES : 20
NUMBER OF CLIENTS : 2600
ASSETS UNDER MANAGEMENT : 650 M€
2 LOCATIONS : PARIS & CHARTRES

In a few words...

Laillet Bordier - Acer Finance is the result of the merger of a management company and a wealth management firm.

It develops advisory, management and asset allocation services management and asset allocation services for private individuals, families, entrepreneurs and families, entrepreneurs and institutions.

1 - WHY DID YOU CHOOSE THE HOKUS PLATFORM (THP) ?

Initially, we were looking for a dematerialized solution to facilitate the transmission of our life insurance contracts. THP's solution exceeds our expectations by offering us a complete digital experience from subscription to management. **This allows us to satisfaction of our clients and to reach a younger target of investors. younger investors.**

2 - HOW DOES THE THP SOLUTION MEET THE OBJECTIVES?

In addition to offering a quality digital experience, the solution saves our employees valuable time. We work with many insurers who often offer several products. several products. By allowing us to access all of our forms through one forms through a single interface and eliminating re-keying time, we can eliminating re-keying time, we can focus our resources on value-added value-added tasks. **Heavy administrative management, time-consuming and error-prone life insurance administration is a distant memory!**



The method of work is structured and structured and the processes too, even if it is a young company

3 - HOW DID THE COLLABORATION GO?

Implementing the THP solution is a full-fledged project that requires the involvement of internal resources and a certain amount of time to set up. However, despite these constraints exchanges with The Hokus Platform remain fluid and the progress of the project is well structured. The interlocutors are clearly identified and the various experts have made themselves available to answer any questions we may have. available to answer any questions we might have. **The regular meetings with the teams have also allowed the project to move forward and to materialize in an efficiently.** We are convinced that this is an investment in time and resources that will have an resources that will have an excellent return on investment