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iMeta's secure website solution gives stockbroker's clients immediate access to investment information

Collins Stewart

case study

Collins Stewart



The offshore stockbroking and investment management arm of Collins Stewart wanted to build a secure, private website to improve its service offering to intermediaries and private clients. It chose iMeta with its strong track record in the financial sector to deliver it.

Collins Stewart Tullet is a FTSE 250 global financial services group. Its stockbroking and investment management business operates under the Collins Stewart brand.

The company has grown rapidly, partly through acquisition, and in 1996 it bought the Channel Islands business from fellow stockbrokers Greig Middleton. Since then, Collins Stewart (CI) Limited has become the largest offshore stockbroker with offices in Guernsey, Jersey and the Isle of Man. The business specialises in providing sophisticated stockbroking and investment management services to institutions, intermediaries such as trust companies) and wealthy private clients.

Supporting the business is Andrew Courtney, Head of IT, and his team of nine staff. He provides all IT and communications for the seven offices in the offshore business, working closely with the Group IT teams.

Immediate access

'Up until now we provided intermediaries with a printed status report for their clients' portfolios on a quarterly basis,' said Andrew. 'Between these times, if they wanted, for example, a valuation on behalf of a client, they would call or fax our client liaison department who would then handle their questions. 'The process was the same for our private clients,' he added.

'However, as personal on-line banking has become generally accepted practice, the intermediaries and our private clients were asking for the same kind of immediate access to information about their investment portfolios.'

Secure, private website

The answer was to create a secure, private website that would enable intermediaries and private clients to view, print and download: the value and make-up of current and month-end portfolios cash and stock movements for any period purchases and salesmcash transfer instructions

'And we also wanted to offer intermediaries and private clients the ability to communicate with us via a secure email facility,' said Andrew. Having decided he needed to buy in outside expertise to develop the site, Andrew looked at three vendors.

Strong experience

Once the project started, iMeta appointed a dedicated project manager who worked with Andrew's team to develop a clear specification.

Find Out More

Please visit www.imeta.co.uk or contact us via the information below



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"iMeta as they impressed us with their overall professional approach. They had real experience of producing secure websites for other financial services companies, and demonstrated that they could integrate this website into our overall systems architecture."

Andrew Courtney
Head of IT
Collins Stewart