

CENTURION financial planner

CASE STUDY

"It's taken a lot of pain away for us in terms of getting relationships into a consistent referring process. It's one system that deals with all our referrals. So, don't take it away please."

STEVE SMITH, IT DIRECTOR



SUMMARY

Centurion spent 30 hours a month managing joint venture relationships. Now, with RQ, everything runs in one compliant system - saving time and cost, and giving every partner live, accurate data.

7
Relationships
on RQ

65
Referrals
received

4x
Faster
payments

30
Hours
saved / month

1

BACKGROUND



Centurion Financial Planners is a leading financial planning firm based just outside Bristol.

Its team helps clients of all kinds plan and achieve their financial goals.

Centurion has built strong relationships with other local trusted firms, forming joint ventures that generate a steady flow of new clients.

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CHALLENGE

High admin burden

Running joint ventures took 30 hours a month and created extra costs and reporting work.

Manual referral tracking

The team recorded referrals manually, causing errors and giving all parties limited visibility.

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SOLUTION

RQ

Streamlined referrals

RQ centralises all referrals in one system, making them automatic, compliant, and easy to manage.

Reduced costs and admin

RQ removes joint venture admin, VAT issues, and regulatory reporting, saving time and money.

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IMPACT

Centurion now saves 30 admin hours each month by managing all referrals through RQ.

The firm runs 8 professional relationships on the platform, tracking 100% of referrals in one system.

Partner payments are now 4x faster, giving everyone clear visibility and timely updates.