BUSINESS CASE WHITEPAPER · FND-005

Ownership information pack

Give your adviser an ownership chart they can check.



The decision

An adviser cannot trace the current ownership picture through records from different dates.

What the fee buys

We draw one ownership chart from supplied records and flag missing facts for the founder and adviser.

When to commission

Commission when the company can supply the underlying records and someone can resolve discrepancies.

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SCOPE AND OPERATING CASE

How the work changes the decision

Starting position

A chart dated March still shows equal ownership. A later record describes a transfer.

In this illustrative case

Attach the two dates to their sources and ask the record owner to resolve the chart before relying on it.

Inputs and ownership

Gather the latest dated ownership records and mark anything you have yet to confirm.

1. Review the supplied ownership records
2. Draw the ownership structure
3. Mark gaps for the founder and adviser

Using the handover

Use the chart to make an adviser's review more efficient and identify records the founders still need to locate.

An alternative to buying

Use an existing verified chart if it reconciles to the latest source documents.

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INVESTMENT AND EVALUATION

Test the case before approving spend

£349 GBP · one-time catalogue fee excluding applicable VAT

Full cost to the buyer

Government, agent, address and bank charges are separate where applicable. Include the cost of preparing inputs, reviewing the output and implementing any subsequent changes.

A time-only comparison

At an illustrative £40 per staff hour, the fee alone equals 8.72 hours. Replace £40 with your own fully loaded hourly cost. Divide the full incremental cost by that rate to find your break-even hours. Count only effort you can reasonably avoid. This illustration predicts no saving.

What to measure

Count ownership statements traceable to a dated record and list any unresolved conflicts. Record a baseline before work begins. Use the same scope and definition at follow-up, and note changes outside this service.

Timing and dependencies

Pay upfront at the external checkout. You can prepare immediately. We track clearance and start intake when payment clears, which can take up to seven business days depending on the payment system. The estimate after start and receipt of complete inputs is 3–7 working days.

Approval test

Commission when the company can supply the underlying records and someone can resolve discrepancies. Assign an owner for the handover and a date for checking the measure. If the inputs or owner are missing, defer the purchase.

Basis: Routine Works service specification FND-005, GBP catalogue fee and an illustrative working case. View service scope.

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