

atWORK Internet Software Solutions

About us

atWORK Internet Software Solutions is a South African company based in Gauteng, we have been developing the atWORK system since 1998 and the service has been available to the independent adviser market since 2005.

The atWORK Solution is designed for the independent financial adviser around the successful platform used by our large corporate clients and is a proven and reliable system developed for the South African market and South African conditions.

We believe that technology should add value and productivity to an adviser's business and in line with this philosophy the system is easy to use and efficient and effective for day to day client management, practice management and financial planning.

Your practice can easily customise the software to the way that you work, you do not have to change or set up time consuming processes. Simplicity and adaptability are the keywords for atWORK.

As well as managing the daily client processes the atWORK system stores all client data, documentation and communication in a secure, fireproof off site data centre. In summary we take all the IT hassles out of your business and manage and protect your valuable client data.

We also help to reduce the complexity in financial planning providing easy processes and using the underlying power of technology to provide a clear and simple report for a client to understand.

atWORK has a compliance monitoring process which makes it easy for you and your compliance officer to manage and audit client files simplifying life for both of you!

Value proposition

Web based adviser practice management system

- Client management system – one click for all client details.
- Practice management system – day to day interactions in your business.
- Document management built in
- Client communication management system
- Financial Planning tools – Risk planning and Investment tools

Services or products offered

We provide the atWORK solution as well as training and ongoing support for our users.

Key individual

Trevor Stacey

Contact person

Trevor Stacey

Contact details

atWORK head office: 0861 289 675
Email: trevors@work.co.za
Trevor Stacey: 082 8809477
Website: www.atwork.co.za

Regions supported

All of South Africa

Quote reference and pricing

Quote reference: Allan Gray Adviser Services

Update training and regular business workshops (estate planning, workflow, client segmentation) are available free of charge to our users once they have paid their initial training costs.