



CASE STUDY

# How Gresham Financial Strategies Transformed Client Communication with Maillock



The financial services industry thrives on trust, efficiency, and clear communication. Clients expect timely updates and seamless interactions, while firms must balance service excellence with operational effectiveness. As digital solutions become increasingly central to financial advice, firms are continually looking for ways to enhance their client experience without compromising on security or efficiency.

**Gresham Financial Strategies Ltd**, a well-respected investment advisory firm, has long prioritised strong client relationships and efficient service delivery. By adopting Maillock, they have been able to streamline their communication process, introducing a system that is efficient, cost-effective, and secure.

## Who Are They?

Gresham Financial Strategies Ltd is an independent financial advisory firm with a strong reputation for tailored investment advice. Their team of six expert advisers manage a client portfolio worth approximately £175 million. Unlike discretionary managers, Gresham Financial Strategies operates on an advisory basis, conducting in-depth fund research and setting bespoke asset allocations to meet their clients' financial goals.

Although investment management is their core focus, they also have a small but dedicated mortgage division, which accounts for 10% of their revenue. With a commitment to long-term client relationships, their primary focus is supporting existing clients.



## Mailock as a Part of Their Business

A firm that embraces technology-driven efficiencies, Gresham Financial Strategies are self-proclaimed 'keen adopters' of Mailock.

Given the continuous engagement required to provide portfolio updates and financial reviews, a secure and seamless communication tool was essential.

A key advantage of Mailock is its widespread adoption across the financial sector.

Many of the providers Gresham Financial Strategies regularly collaborate with, including Aegon, also use the platform, making the transition smoother and ensuring a joined-up approach to secure communication.

**"We use Mailock quite extensively. We use it to send all client communications where there is confidential information involved."**

David Turner  
Director





## The Benefits of Mailock

Before adopting Mailock, the firm relied on individually password-protecting each document before sending it to clients. This method was not only labour-intensive but also frustrating for clients, who had to open multiple documents using different passwords.

**“Because email is not a secure communication system, prior to using Mailock, we used to password-protect documents individually. Clients would get their reviews, illustrations, valuations, all individually password-protected... which was a pain for us because we had to do them individually, and a pain for the clients because they had to open them individually as well.”**

Now, the firm has dramatically reduced the time and effort spent on securing documents. Advisers can send financial reviews and recommendations securely in just a few clicks.

**“Mailock has made sending out client reviews, recommendations, and other information much easier, because we can just email them to the clients. It has saved us a huge amount of time.”**

Beyond efficiency, Mailock has also led to considerable cost savings. By moving away from paper-based communications, the firm has significantly cut printing and postage expenses.

**“We don’t print anything like as much as we used to prior to the pandemic, so Mailock has saved us printing costs and postage costs.”**

**“Mailock has had a positive impact on the firm. When you take into account the postage costs, the printing costs, and the time saved, there most likely has been a net cost saving.”**

David Turner  
Director

**Gresham**  
Financial Strategies

## An Evolution in Communication

Over the years, the firm's approach to communication has evolved in response to both client needs and external circumstances.

While the majority of clients have welcomed the transition and adopted Mailock quite happily, Gresham Financial Strategies remains committed to offering flexibility.

**"There are one or two clients who still prefer password-protected documents or who prefer to have paper copies of reviews sent in the post, so we do that."**

For those who still prefer physical documents or alternative digital formats, the firm ensures their preferences are accommodated.



**"Before the pandemic, everything went by paper. Then, when we couldn't do that, we sent password-protected documents. Now, we use Mailock."**

David Turner  
Director





## Client privacy, guaranteed

Maillock's secure email solution is the complete package for businesses looking to take their client communications to the next level.



Discover what Maillock  
can do for your business

