

# HOW WE MOVE YOU FROM BANKLINK TO THE NEW CONNECTED LEDGER



## PROCESS OVERVIEW



## BENEFITS OF THE PROCESS

- 1 Support from a dedicated Concierge Consultant**  
Your dedicated Concierge Consultant is responsible for the end-to-end management of your migration, including scheduled consulting, providing training, and post-migration follow-ups.
- 2 Visibility over organising training**  
A project plan to get all your files moved over will be discussed with you and ensure you are well informed at every step of the process.
- 3 Minimal prep work**  
The Concierge Consultant will take care of all the necessary prework once they collect the client files taking the pressure and workload off you.
- 4 Handover of files and post-migration training**  
Your Concierge Consultant will make sure you have the knowledge and understanding to review files before commencing working with Essentials.