

Canaccord Genuity Wealth Management UK & Europe, selected Keepabl for easier and more comprehensive Privacy Governance



'As a regulated financial firm with the highest standards in client services and relationship management, Canaccord Genuity Wealth Management in the UK & Europe has long implemented best practices in data protection across each jurisdiction in which we operate.

'So we were early adopters of Privacy Tech, to make ongoing compliance easier and more efficient.

'We moved to Keepabl as it's much simpler than our previous service yet better in dealing with multiple entities. It makes ongoing compliance and reporting easier, and its breach and risk modules are really excellent.'



Anna Trickey
Group Head of Compliance,
Canaccord Genuity Wealth
Management UK and Europe

CLIENT PROFILE

Canaccord Genuity Wealth Management (**CGWM**) in the UK & Europe offers a broad range of wealth management solutions. It has successfully grown its business and reputation over the years, and now manages and administers over £22.1bn of assets (as at 31 March 2020).

It prides itself on providing efficient and effective wealth management, as well as economies of scale, while being small enough to provide a personal relationship-led service with direct access to its people and knowledge.

It is part of Canaccord Genuity Group Inc., a publicly traded company under the symbol CF on the Toronto Stock Exchange with offices in 10 countries.

THE GDPR CHALLENGE

One of CGWM's core differentiations is its personal, relationship-led service with direct access to CGWM's investment experts. Naturally, this means personal data is at the core of everything it does.

CGWM recognised early that managing Privacy Governance through spreadsheets was far from optimal and certainly not sustainable. Managing multiple entities was not easy; risk and breach modules were basic; and the system's level of complexity didn't help. 'We've always had excellent governance', says Anna Trickey, Group Head of Compliance at CGWM in the UK and Europe, 'but our initial technology solution wasn't supporting us as we'd hoped it would. So when Keepabl called, we were interested.'

The Customer
Canaccord Genuity
Wealth Management
UK & Europe

The Challenge
Switching Privacy SaaS provider
& updating Privacy Governance

The Solution
Keepabl's
GDPR SaaS Solution
& Privacy Policy Pack

The Results

- Effective migration to Keepabl
- Improved Privacy Governance
- Improved GDPR reporting

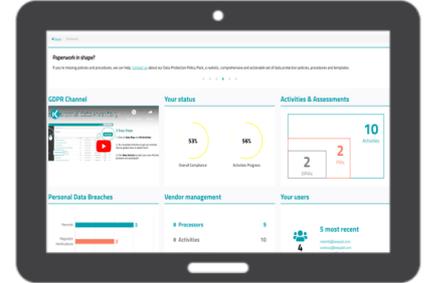
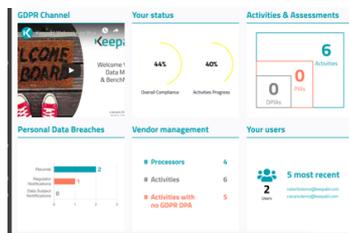
THE SOLUTION

Simple, fast migration

Keepabl makes migrating from spreadsheets or a legacy provider easy.

‘The friendly Keepabl team helped us transition, which was surprisingly easy and fast’ says Ceri Turton, Company Secretary, Canaccord Genuity Wealth (International) Ltd.

‘And as soon as any information transitioned,’ continued Ceri, ‘we could see it immediately flow into Keepabl’s instant GDPR reports and KPIs.’



Screenshots are examples only, not from a customer instance

Risk & Breach

Adopting Keepabl’s Risk and Breach solutions let CGWM move risk and breach management to Keepabl’s integrated, cloud-based service, with an easy way to record suspected personal data breaches, instant email alerts to the response team for rapid containment, and easy capture of necessary information in case notification was required.

THE RESULTS

‘We were up and running very smoothly and quickly with excellent onboarding support from Keepabl’ notes CGWM’s Anna Trickey.

Anna continues, ‘We’re delighted to have a solution that has such a positive effect on how we work and meet ongoing GDPR compliance across countries.’

Still struggling with spreadsheets?

Contact us to see how easy we make getting – and staying – compliant with GDPR.

Our holistic approach means you’re up and running quickly, and see results quickly.

hello@keepabl.com