



Charlie[™] User Review

Custodian Financial Group



Jason Rance

Role	Director & Financial Adviser
Firm	Custodian Financial Group custodianfinancial.com.au
Happy Charlie Users Since	2016

Hey Jason, tell us, what do you do all day?

I am jointly responsible for the day-to-day management of our financial advisory practice which provides a holistic and tailored service to a number of individuals, businesses and not-for profit organisations.

My role involves managing and liaising with a wide range of stakeholders including our staff, clients and various third parties (e.g. financial institutions, other professionals, etc.).

How does your team use Charlie?

We use Charlie to manage all email correspondence to and from our office (both internally and externally).

Charlie automatically saves all of our emails and archives them into client groups so that we have a complete record of any email communication.

Charlie allows us to quickly and easily search and recall messages sent to and from anyone at our firm (Charlie gives the option to search by email address, client group, attachments, subject, etc.).

It also removes our reliance on Outlook as all emails are centralised. Charlie gives us a full picture of our message history, in one location, rather than having various bits and pieces of information being held in individual email accounts.

Given all of this, we're confident that there aren't any gaps in our record-keeping and our people will be able to find past emails very efficiently.



Was there a time when you were really glad to have Charlie as a sidekick?

We act as the mailing house for several not-for-profit organisations.

Previously, we needed to manually save all email communication and create a sophisticated folder structure to be able to find past emails. Charlie has relieved us of this task, and now auto-files and acts as our email storage facility.

Tell us about Charlie's learning curve.

Charlie is very powerful but also very simple. The value of Charlie lies in the fact that it does not require a large investment of time and makes our practice more efficient.

In short, what would you tell someone considering Charlie?

I would recommend Charlie to any organisation that uses email as a form of communication.

User's Review in Summary	
User's Overall Experience	★★★★★
Favourite Feature	"Ability to search for historical emails using very specific filters"
Charlie in 5 words	Powerful, efficient, seamless, centralised, helpful

Need more info? Contact Us.

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