




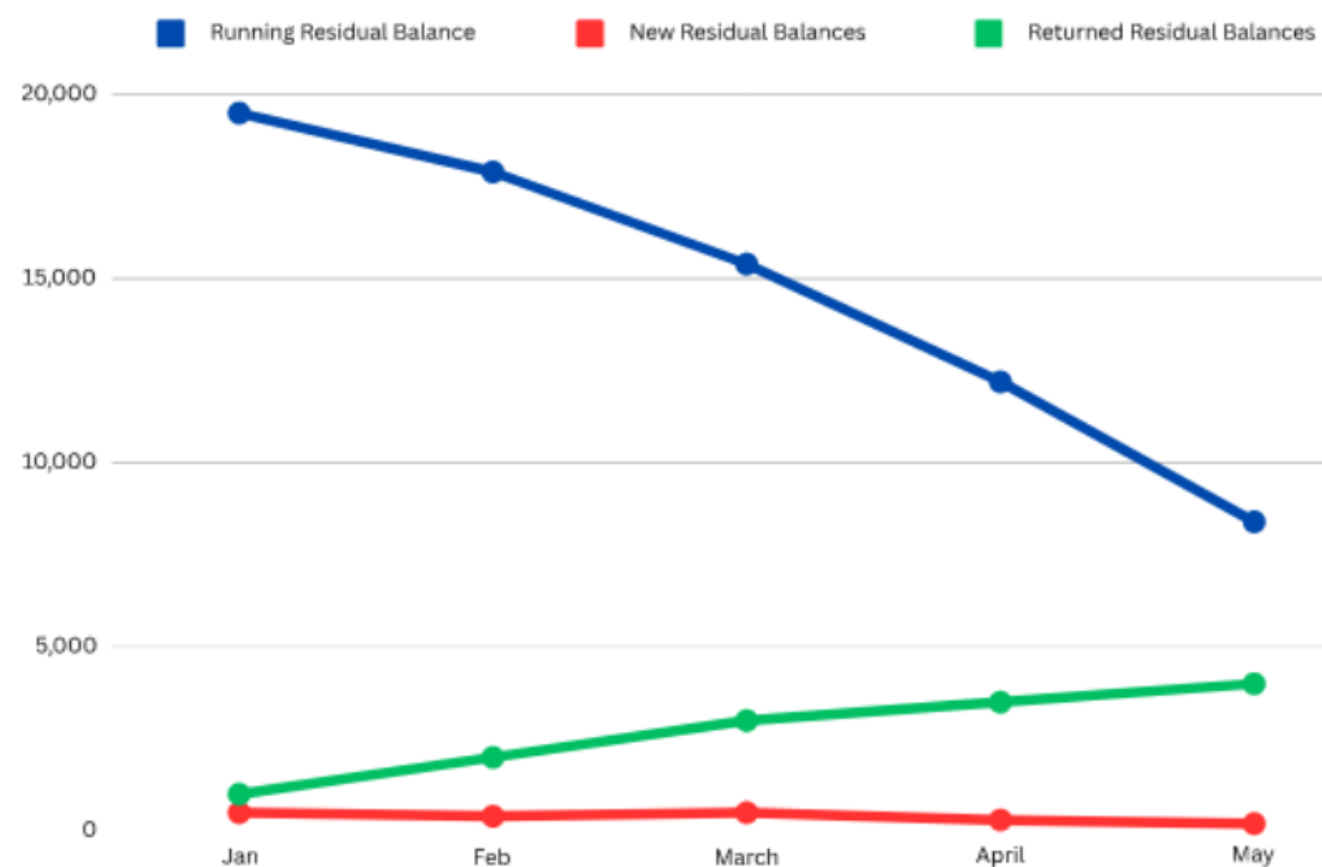
# SafeRemit

The complete outsourced service for proactive management of residual balances

SafeRemit is an end to end solution for **managing and clearing residual balances** on behalf of your law firm - removing the administrative burden from your team and **freeing up valuable time**

-  Complete register of your residual balances, with detailed history of the steps taken to return funds to your clients
-  Variety of workflows for contacting clients, depending on the size of the balance and contact information available
-  Auto generation of form letters, including DWP Forwarding, SRA withdrawal authorisation requests and charity indemnities

SafeRemit Balances



# Our Process

1

## IDENTIFY

**Your accounts team runs a report on a monthly basis to identify any residual balances your firm holds. You upload these balances into our platform**

2

## CONTACT

**For each new residual balance we follow a structured workflow to make contact with the client through a variety of channels and make them aware of the balance**

3

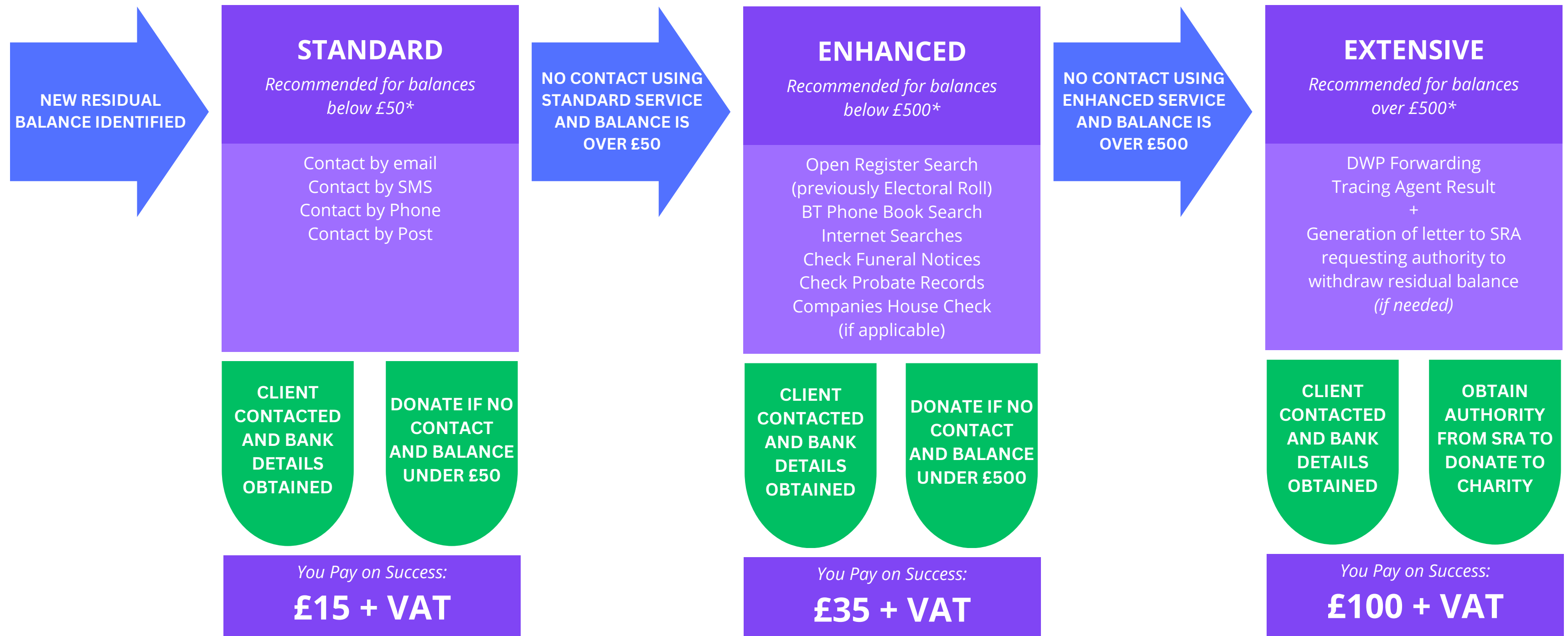
## MANAGE

**We maintain a central register on your behalf, that shows the status of all residual balances you hold and the steps taken to return them**

If the client is contacted, bank details are obtained so you can return funds to them. If all attempts to contact the client are unsuccessful, you can choose to donate the balance to charity (we can generate an authorisation request letter to the SRA when needed too).

# Our Workflow

We work on a “pay on success” basis plus a monthly platform fee of £100+VAT. You only pay when you are able to close off a balance, either because you could send the money back to the client or were in a position to give it to a charity. Each balance you add onto our system enters our residual balance reduction workflow. Steps will vary depending on the contact information you share with us (e.g. no phone number, no phone call).



\*your firm can configure the balance levels according to its own residual balance policies

# Get in touch



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**Arrange a Demo or Schedule a Call:**  
<https://www.safecapital.co.uk/contact>